User Manual

(How does E-filing Work?)

PAYE and CIS Returns

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Table of Contents

Key Summary of the E-filing Process 1

Step 1. Sign Up / Sign In 5

Sign Up : 6

How to Appoint Additional Users : 7

Sign In : 8

Step 2. Download Spreadsheet 9

Step 3. Populate your data into the spreadsheet 13

Step 4. Upload your data to eFileReady 15

Step 5. E-File your data 20

Check your E-filing Status 27

Step 6. E-Filing Multiple Company Details 29

Step 7. Appointing Additional Users 31

Key Summary of the E-Filing Process

This summary shows you the steps involved to e-file your data.
Whatever you are e-filing, the steps involved are the same.

- CIS300, CIS Subcontractor verifications
- PAYE P14, P35, P45 etc data,

Step 1 Sign Up / Sign In.

Step 2 Download the given spreadsheet template from our website

Step 3 Populate the data from your system into the given spreadsheet.

Step 4 Assign a file name to the spreadsheet and save it in a CSV file format.

Step 5 Sign in to the website and select Upload CSV File from the top menu bar.

Step 6 Click on the Browse button to find the CSV file that you just assigned a name to, and then upload that CSV file.

Step 7 E-file the uploaded file by clicking on E-File Now!, or amend the file based on the error report we have given you and then upload the file again.

Step 8 Print the E-filing Certificate and view reports.

(More information about each of the steps is detailed below.)

Support Email: Kevin.Munn@efileready.com **Tel:** 020 8452 9516

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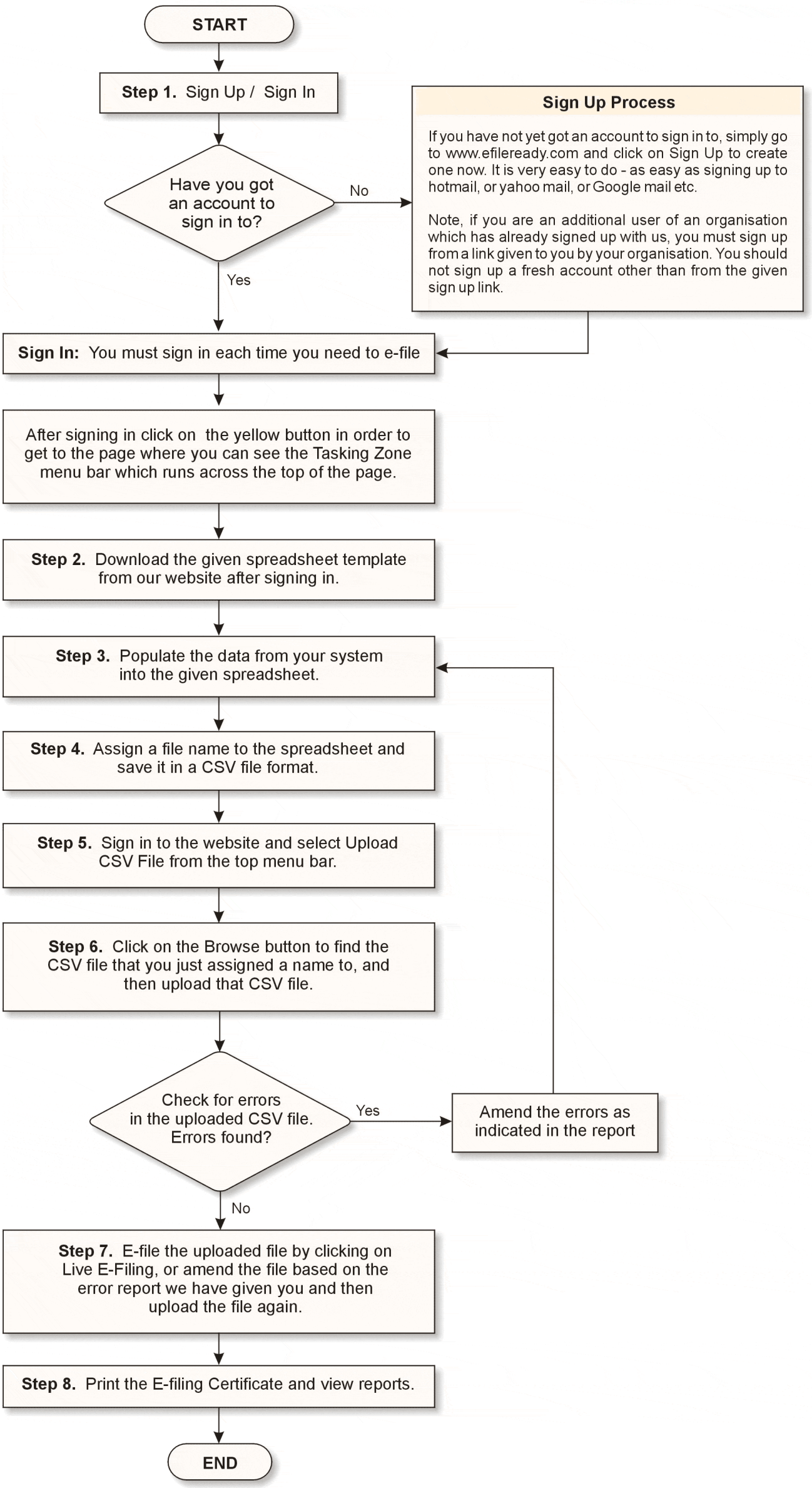
How Does www.EfileReady.com E-filing Work?


START
Step 1. Sign Up / Sign In
Have you got an account to sign in to?
No
Yes
Sign Up Process
If you have not yet got an account to sign in to, simply go to www.efileready.com and click on Sign Up to create one now. It is very easy to do - as easy as signing up to hotmail, or yahoo mail, or Google mail etc.
Note, if you are an additional user of an organisation which has already signed up with us, you must sign up from a link given to you by your organisation. You should not sign up a fresh account other than from the given sign up link.
Sign In: You must sign in each time you need to e-file
After signing in click on the yellow button in order to get to the page where you can see the Tasking Zone menu bar which runs across the top of the page.
Step 2. Download the given spreadsheet template from our website after signing in.
Step 3. Populate the data from your system into the given spreadsheet.
Step 4. Assign a file name to the spreadsheet and save it in a CSV file format.
Step 5. Sign in to the website and select Upload CSV File from the top menu bar.
Step 6. Click on the Browse button to find the CSV file that you just assigned a name to, and then upload that CSV file.
Check for errors in the uploaded CSV file. Errors found?
Yes
Amend the errors as indicated in the report
No
Step 7. E-file the uploaded file by clicking on Live E-Filing, or amend the file based on the error report we have given you and then upload the file again.
Step 8. Print the E-filing Certificate and view reports.
END

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The following steps explain how you can use www.efileready.com to e-file your returns.

Step 1. Sign Up / Sign In

Sign Up :

If you have not yet got an account to sign in to, simply go to www.efileready.com and click on 'Sign Up' to create one now. It is very easy to do - as easy as signing up to an email account such as hotmail, yahoo mail, or Google mail etc.

Before you start the sign up process, please ensure you have the following details to hand. They will need to be entered to complete the sign up:-

Accounts Office Reference and PAYE Reference Number (optional)

All employers who register with the HMRC are issued with an Accounts Office Reference and a PAYE Reference Number. They can be found on any documents or correspondence received from your tax office. For example, on your yellow paying-in book and your P35 form.

This sign up process is carried out only once.

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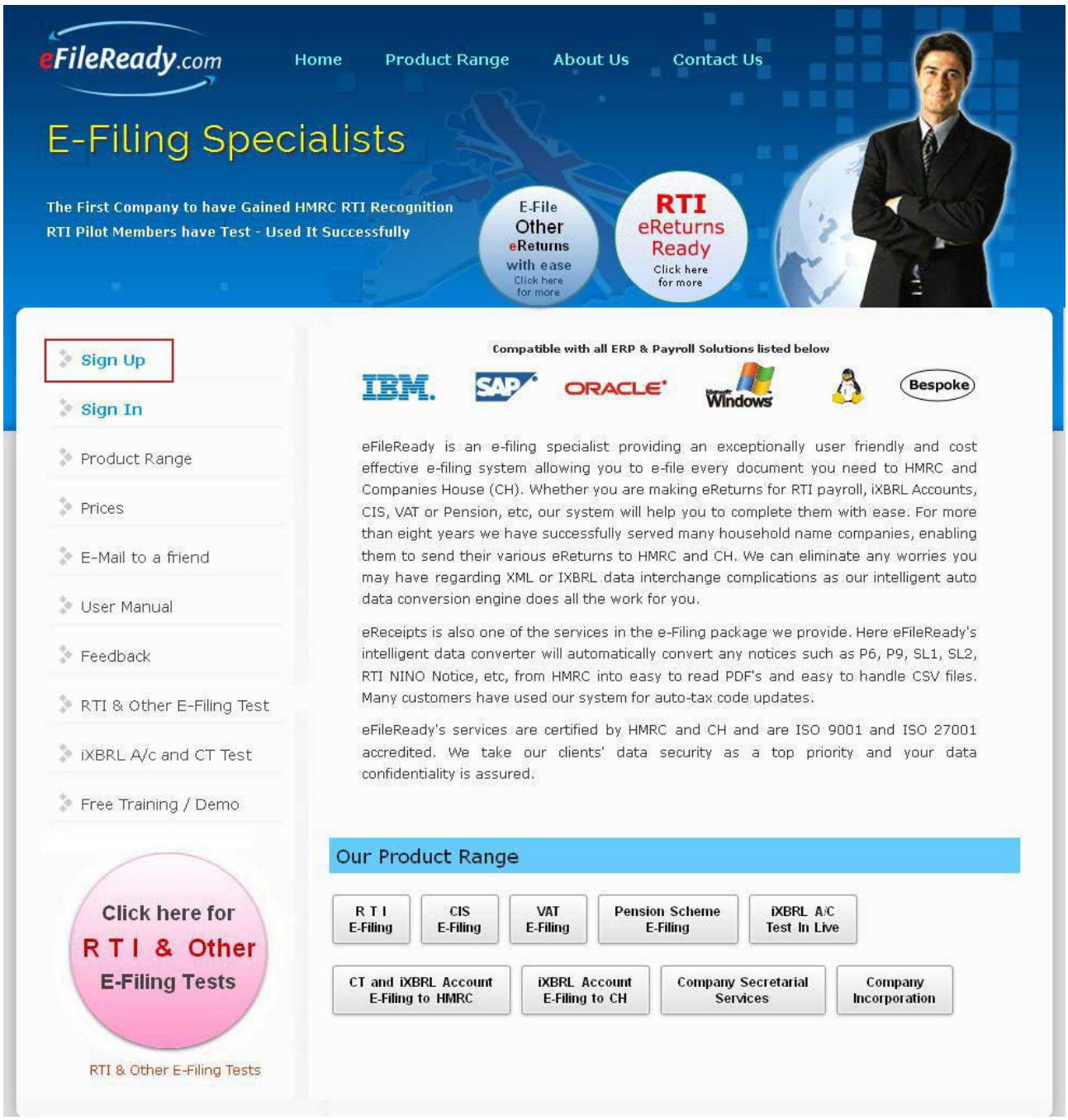
eFileReady.com
Home
Product Range
About Us
Contact Us
E-Filing Specialists
The First Company to have Gained HMRC RTI Recognition
RTI Pilot Members have Test - Used It Successfully
E-File Other eReturns with ease
Click here for more
RTI eReturns Ready
Click here for more
Sign Up
Sign In
Product Range
Prices
E-Mail to a friend
User Manual
Feedback
RTI & Other E-Filing Test
iXBRL A/c and CT Test
Free Training / Demo
Click here for R T I & Other E-Filing Tests
RTI & Other E-Filing Tests
Compatible with all ERP & Payroll Solutions listed below
IBM
SAP
ORACLE
Windows
Bespoke
eFileReady is an e-filing specialist providing an exceptionally user friendly and cost effective e-filing system allowing you to e-file every document you need to HMRC and Companies House (CH). Whether you are making eReturns for RTI payroll, iXBRL Accounts, CIS, VAT or Pension, etc, our system will help you to complete them with ease. For more than eight years we have successfully served many household name companies, enabling them to send their various eReturns to HMRC and CH. We can eliminate any worries you may have regarding XML or IXBRL data interchange complications as our intelligent auto data conversion engine does all the work for you.
eReceipts is also one of the services in the e-Filing package we provide. Here eFileReady's intelligent data converter will automatically convert any notices such as P6, P9, SL1, SL2, RTI NINO Notice, etc, from HMRC into easy to read PDF's and easy to handle CSV files. Many customers have used our system for auto-tax code updates.
eFileReady's services are certified by HMRC and CH and are ISO 9001 and ISO 27001 accredited. We take our clients' data security as a top priority and your data confidentiality is assured.
Our Product Range
R T I E-Filing
CIS E-Filing
VAT E-Filing
Pension Scheme E-Filing
iXBRL A/C Test In Live
CT and iXBRL Account E-Filing to HMRC
iXBRL Account E-Filing to CH
Company Secretarial Services
Company Incorporation

Fig 1.1 Home Page – Sign Up

Important Note to Additional Users: if you are an additional user of an organisation which has already signed up with us, you must sign up via a link emailed to you by your organisation's system administrator. You should not sign up for a fresh account from our home page.

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How to Appoint Additional Users :

If you are a system administrator and wish to allow other people in your organisation to have access to the e-filing service, please follow the steps detailed below.

In the Tasking Zone menu click on Employer/Contractor, then further select the sub-menu Employer/Contractor Details. Click on the 'View/Edit' button for Additional User Details, then click on the 'Add New User' button.

For more details please refer to the eFileReady Sign Up / Sign In manual.

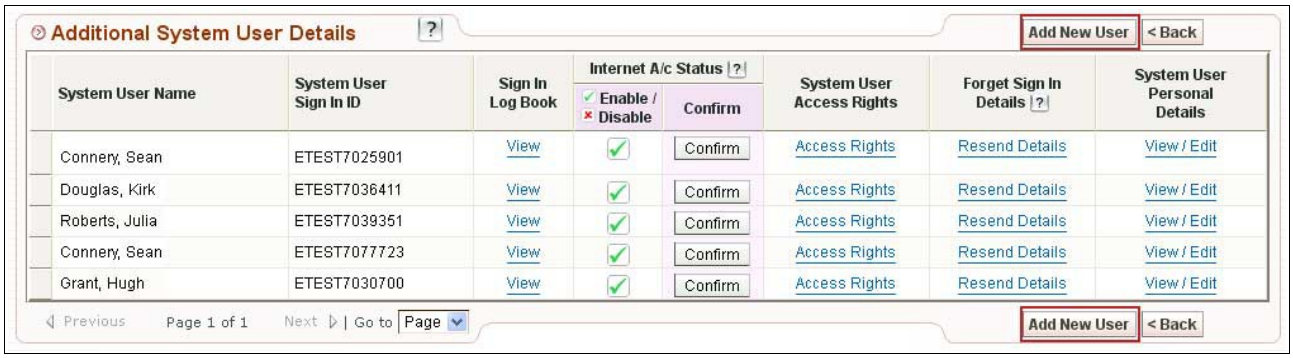
Additional System User Details
Add New User
< Back
System User Name
System User Sign In ID
Sign In Log Book
Internet A/c Status
Enable / Disable
Confirm
System User Access Rights
Forget Sign In Details
System User Personal Details
Connery, Sean ETEST7025901 View Confirm Access Rights Resend Details View / Edit
Douglas, Kirk ETEST7036411 View Confirm Access Rights Resend Details View / Edit
Roberts, Julia ETEST7039351 View Confirm Access Rights Resend Details View / Edit
Connery, Sean ETEST7077723 View Confirm Access Rights Resend Details View / Edit
Grant, Hugh ETEST7030700 View Confirm Access Rights Resend Details View / Edit
Previous
Page 1 of 1
Next
Go to Page
Add New User
< Back

Fig 1.2 Add Additional Users

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Sign In :

You must sign in each time you need to e-file.

For more details please refer to our separate eFileReady Sign Up / Sign In manual.

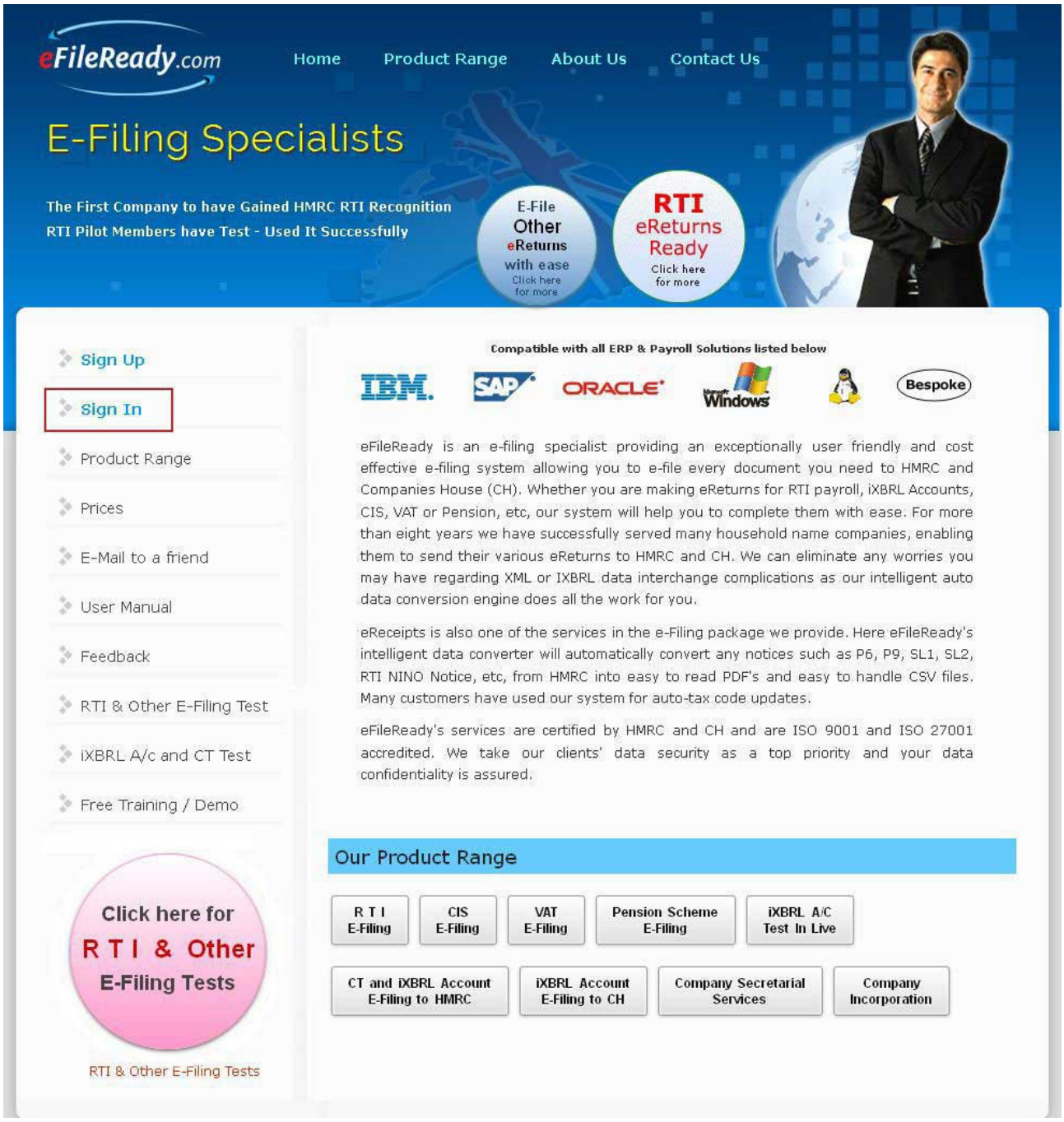
eFileReady.com
Home
Product Range
About Us
Contact Us
E-Filing Specialists
The First Company to have Gained HMRC RTI Recognition
RTI Pilot Members have Test - Used It Successfully
E-File Other eReturns with ease
Click here for more
RTI eReturns Ready
Click here for more
Sign Up
Sign In
Product Range
Prices
E-Mail to a friend
User Manual
Feedback
RTI & Other E-Filing Test
iXBRL A/c and CT Test
Free Training / Demo
Click here for R T I & Other E-Filing Tests
RTI & Other E-Filing Tests
Compatible with all ERP & Payroll Solutions listed below
IBM
SAP
ORACLE
Windows
Bespoke
eFileReady is an e-filing specialist providing an exceptionally user friendly and cost effective e-filing system allowing you to e-file every document you need to HMRC and Companies House (CH). Whether you are making eReturns for RTI payroll, iXBRL Accounts, CIS, VAT or Pension, etc, our system will help you to complete them with ease. For more than eight years we have successfully served many household name companies, enabling them to send their various eReturns to HMRC and CH. We can eliminate any worries you may have regarding XML or IXBRL data interchange complications as our intelligent auto data conversion engine does all the work for you.
eReceipts is also one of the services in the e-Filing package we provide. Here eFileReady's intelligent data converter will automatically convert any notices such as P6, P9, SL1, SL2, RTI NINO Notice, etc, from HMRC into easy to read PDF's and easy to handle CSV files. Many customers have used our system for auto-tax code updates.
eFileReady's services are certified by HMRC and CH and are ISO 9001 and ISO 27001 accredited. We take our clients' data security as a top priority and your data confidentiality is assured.
Our Product Range
R T I E-Filing
CIS E-Filing
VAT E-Filing
Pension Scheme E-Filing
iXBRL A/C Test In Live
CT and iXBRL Account E-Filing to HMRC
iXBRL Account E-Filing to CH
Company Secretarial Services
Company Incorporation

Fig 1.3 Home Page – Sign In

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Step 2. Download Spreadsheet

Download the CIS300 spreadsheet, or any other document spreadsheet as required, to your local system.

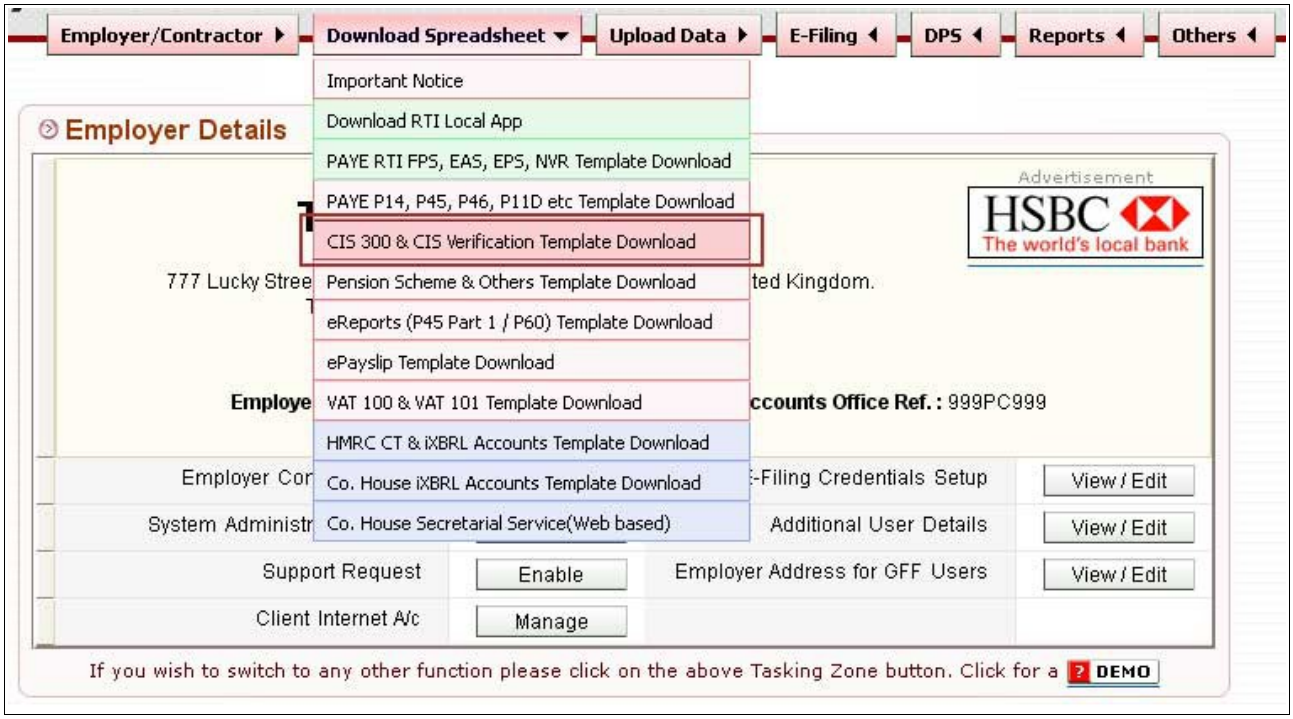

Fig 2.1 Go to Download Spreadsheet in the Tasking Zone, then click on the appropriate sub-menu

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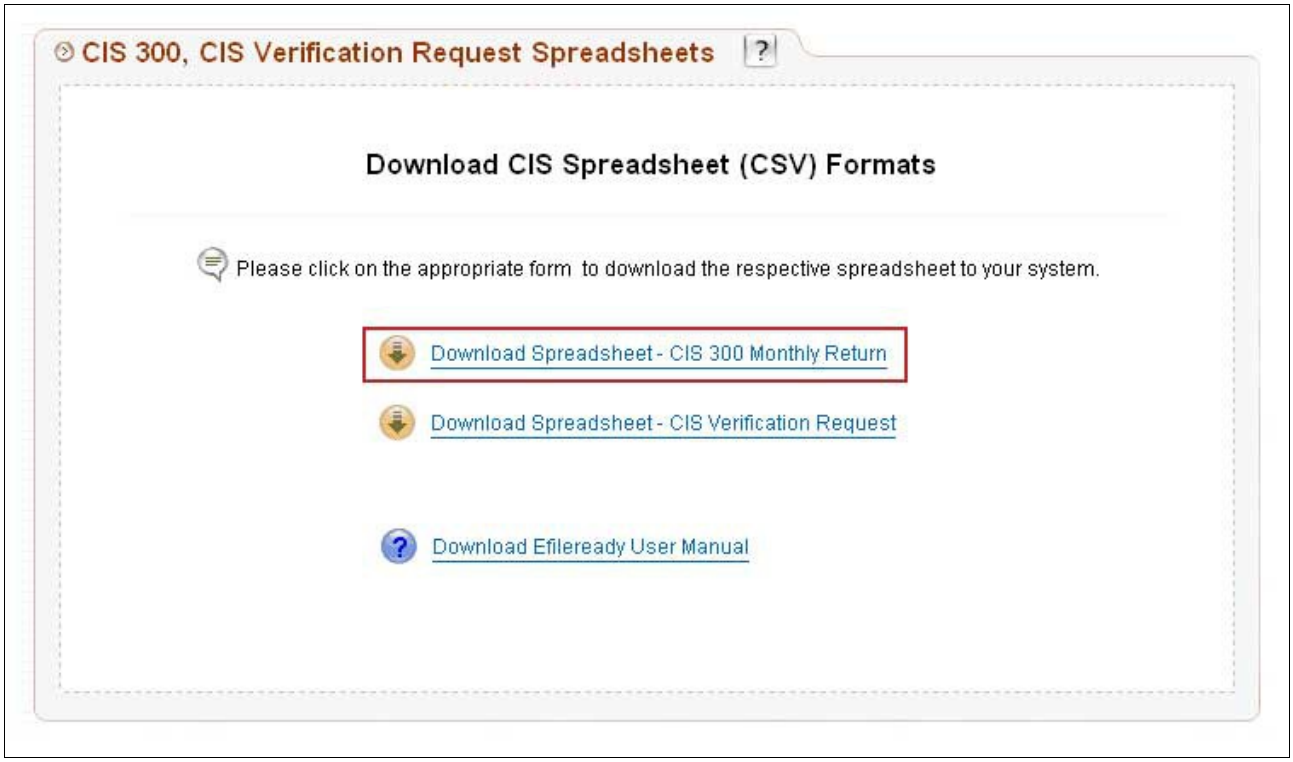
CIS 300, CIS Verification Request Spreadsheets
?
Download CIS Spreadsheet (CSV) Formats
Please click on the appropriate form to download the respective spreadsheet to your system.
Download Spreadsheet - CIS 300 Monthly Return
Download Spreadsheet - CIS Verification Request
Download Efileready User Manual

Fig 2.2 Click on the required spreadsheet

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Download CIS 300 Monthly Return Spreadsheet
Read Me First
< Back
Download CIS 300 Spreadsheet (without eStatement - 2 Files)
We have introduced a FREE eStatement service in the system. If you wish to use the eStatement function you need to download the new spreadsheet files, which can be found in our spreadsheet download section (option 2 or 3). If you do not wish to use the eStatement function you can continue to download the current spreadsheets files. Option 1 is for current users without the eStatement function.
Always download and read the instructions before you populate your data into the spreadsheet.
Download
Instruction for CIS 300 Monthly Return Spreadsheet (Contractor)
Download
CIS 300 Monthly Return Spreadsheet document (Contractor)
Download
Instruction for CIS 300 Monthly Return Spreadsheet (Subcontractor)
Download
CIS 300 Monthly Return Spreadsheet document (Subcontractor)
Once downloaded, you should enter your data into the Spreadsheet and save it in a CSV format. Then select Upload CSV Data from the Tasking Zone to save the spreadsheet back to our server in a CSV format ready for E-Filing
< Back

Fig 2.3 Click to download the required spreadsheet

Note: Full instructions for entering your data in the spreadsheet are provided and can be downloaded. We recommend you read these instructions before filling in the actual spreadsheet.

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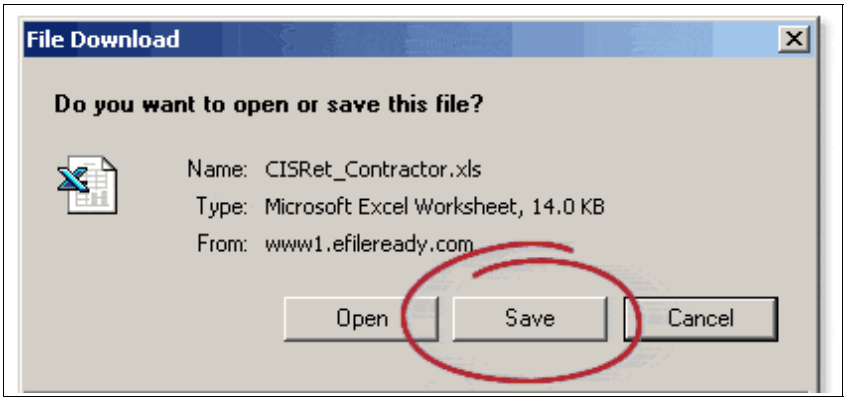

Fig 2.4 Download and Save the spreadsheet to your local system

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Step 3. Populate your data into the spreadsheet

Populate the CIS300 data from your system into the downloaded spreadsheet. Refer to the instructions provided if you are unsure of any field.

This can be done off-line, so after downloading the spreadsheets, and help files, you can log out from eFileReady. You do not need to be logged in to eFileReady to enter data into the spreadsheets.

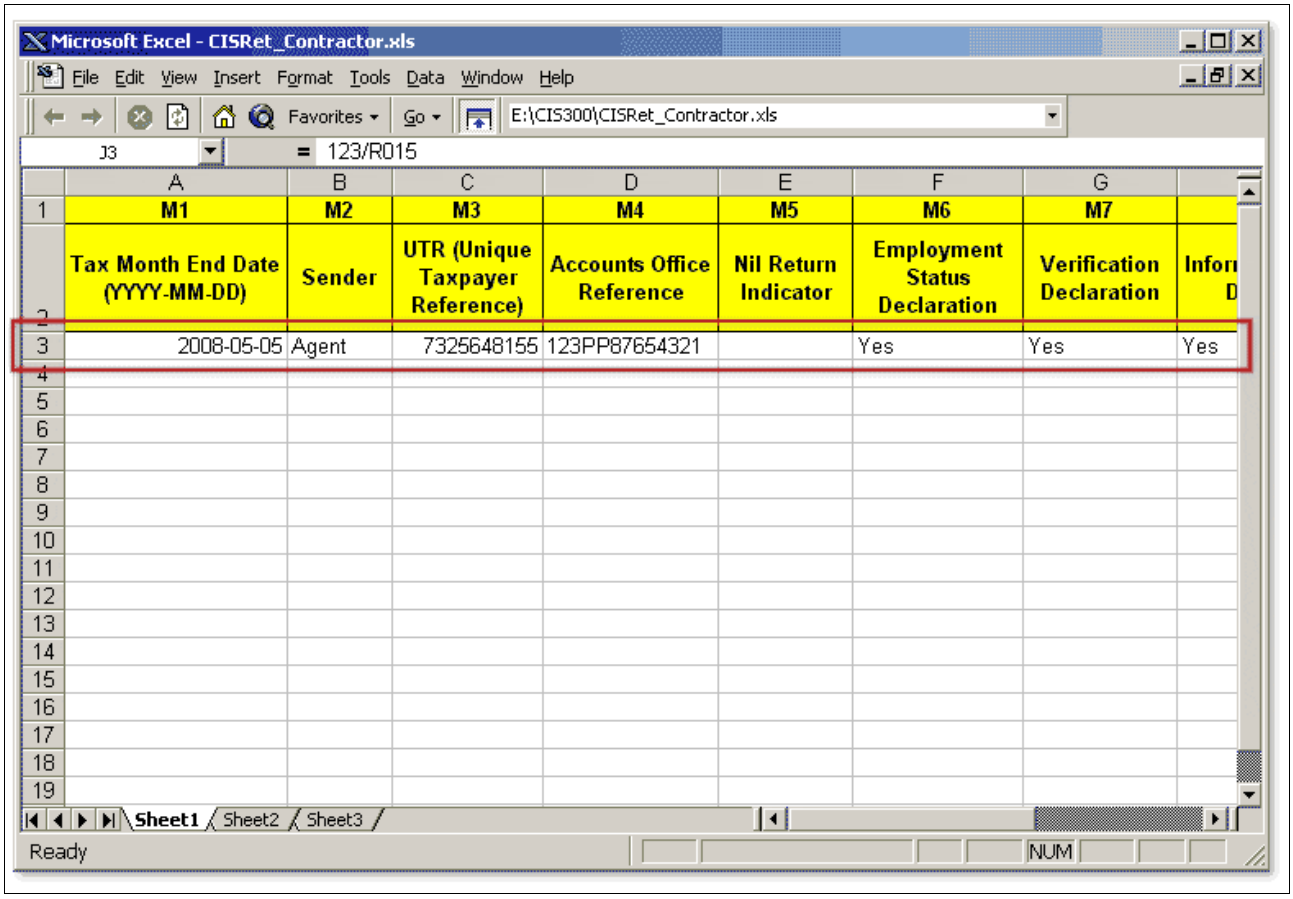

Fig 3.1 Populate your data into the downloaded spreadsheet Now save your data in the spreadsheet in a CSV format.

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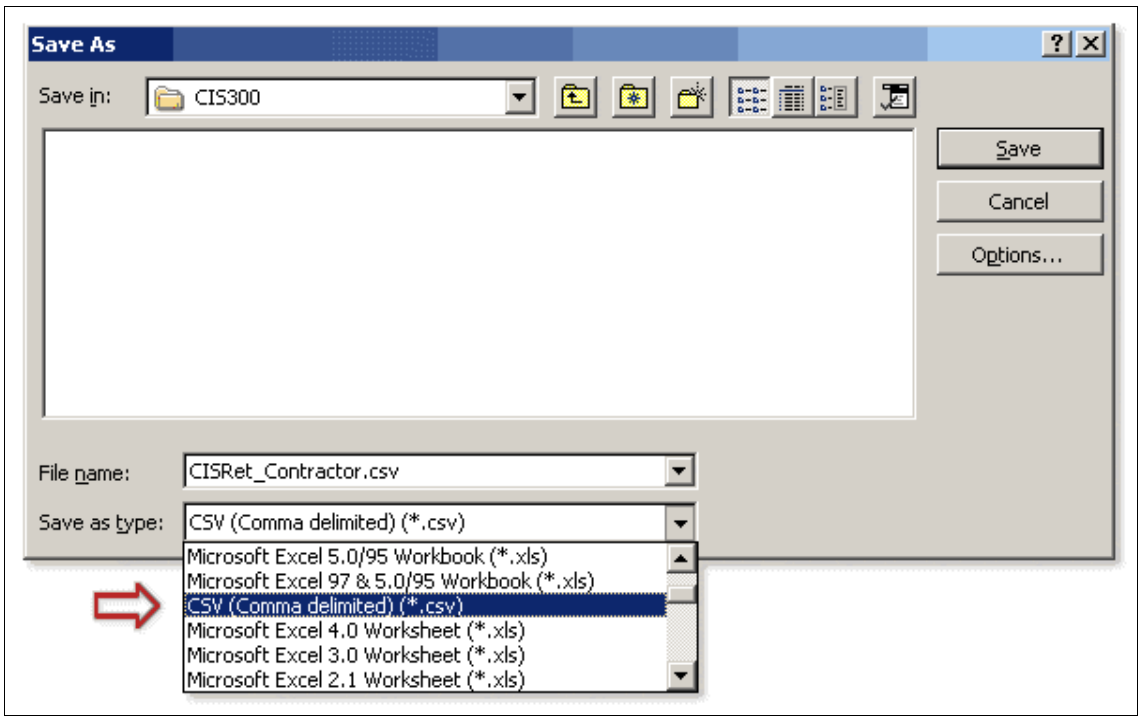

Fig 3.2 Save the spreadsheet as a CSV file

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Step 4. Upload your data to eFileReady

Sign in to **WWW.EFILEREADY.COM**

Select Upload Data File from the Tasking Zone menu and then further select CIS 300 & CIS Verification Upload.

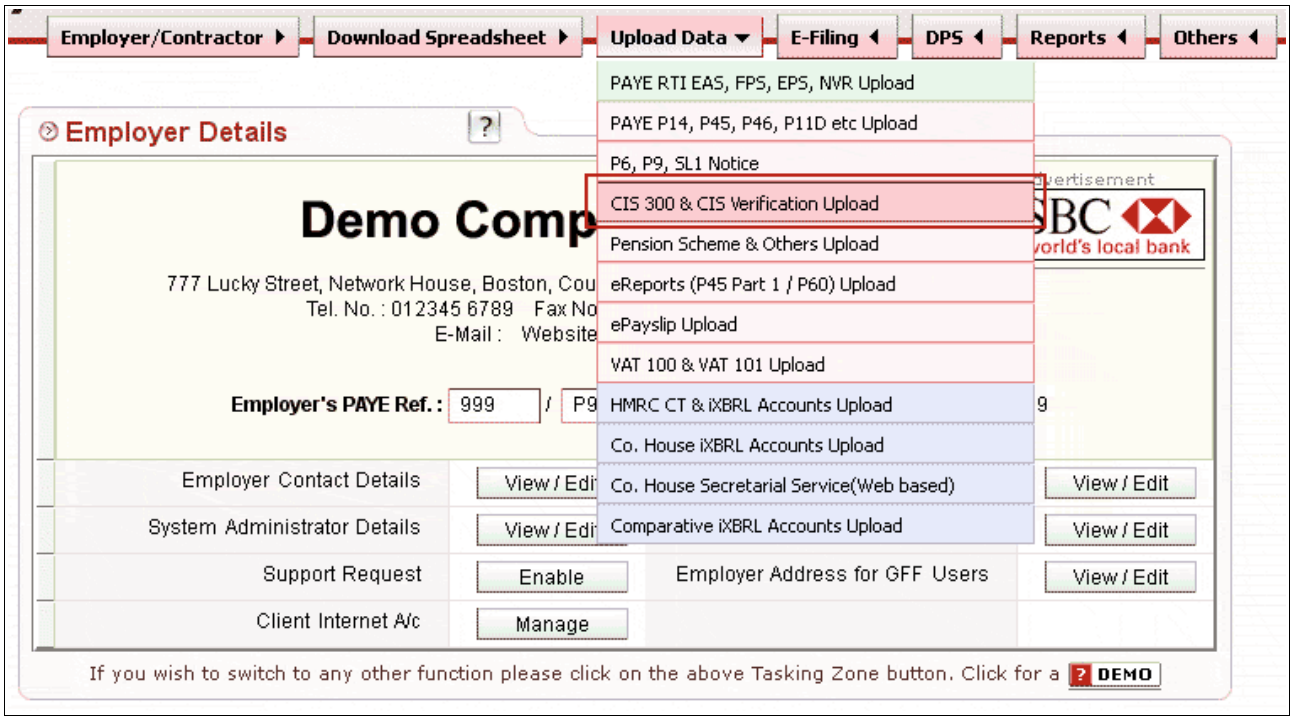
Employer/Contractor
Download Spreadsheet
Upload Data
E-Filing
DPS
Reports
Others
PAYE RTI EAS, FPS, EPS, NVR Upload
PAYE P14, P45, P46, P11D etc Upload
P6, P9, SL1 Notice
CIS 300 & CIS Verification Upload
Pension Scheme & Others Upload
eReports (P45 Part 1 / P60) Upload
ePayslip Upload
VAT 100 & VAT 101 Upload
HMRC CT & iXBRL Accounts Upload
Co. House iXBRL Accounts Upload
Co. House Secretarial Service(Web based)
Comparative iXBRL Accounts Upload
Employer Details
Demo Comp
777 Lucky Street, Network House, Boston, Cou
Tel. No. : 012345 6789 Fax No
E-Mail : Website
Employer's PAYE Ref. : 999
Employer Contact Details
System Administrator Details
Support Request
Client Internet A/c
View / Edit
Enable
Manage
Employer Address for GFF Users
If you wish to switch to any other function please click on the above Tasking Zone button. Click for a DEMO

Fig 4.1 Click on the Upload Data File sub-menu

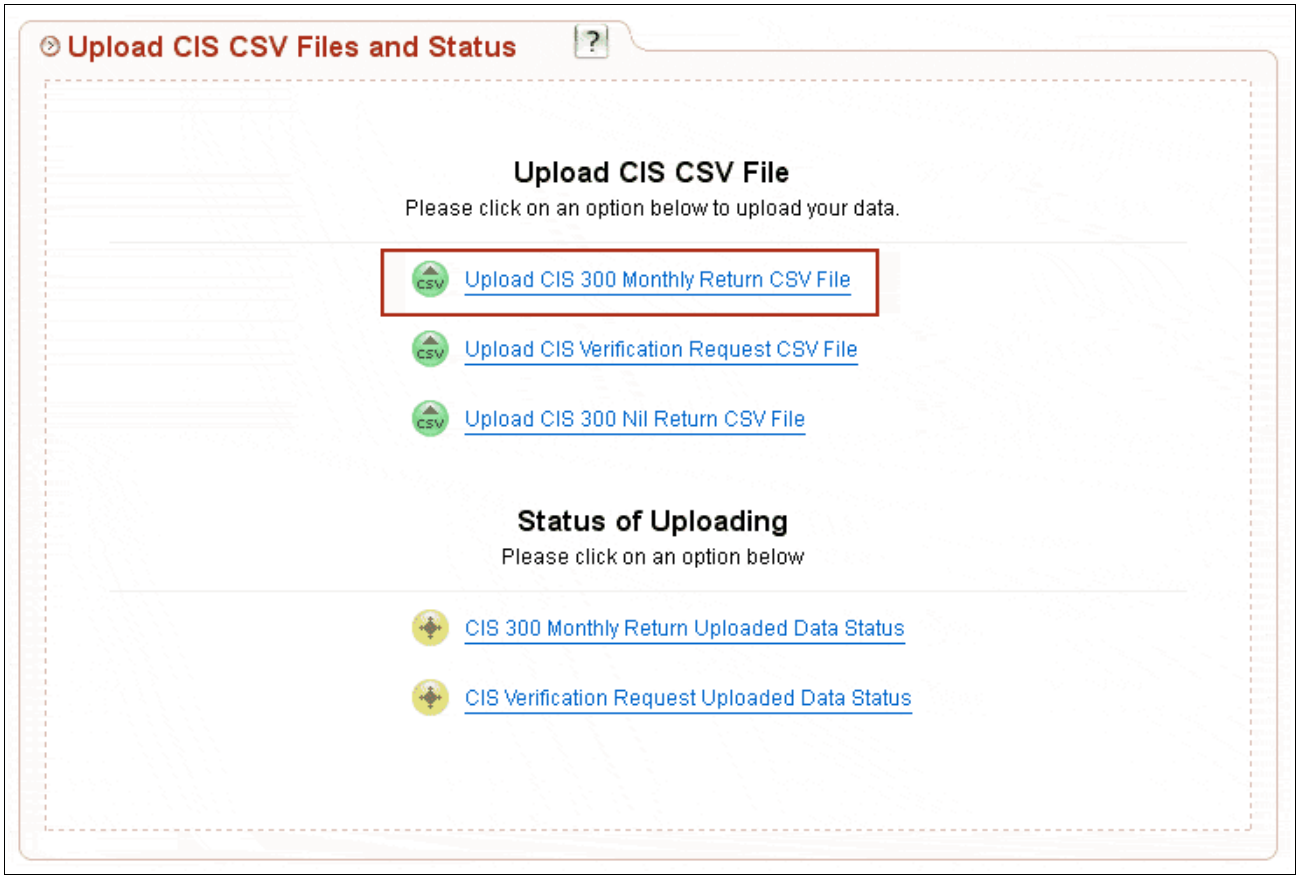
Upload CIS CSV Files and Status
?
Upload CIS CSV File
Please click on an option below to upload your data.
Upload CIS 300 Monthly Return CSV File
Upload CIS Verification Request CSV File
Upload CIS 300 Nil Return CSV File
Status of Uploading
Please click on an option below
CIS 300 Monthly Return Uploaded Data Status
CIS Verification Request Uploaded Data Status

Fig 4.2 Click on the appropriate Upload CSV File link

Pick up the CIS spreadsheet file you just saved in your local system by clicking on the 'Browse' button (in just the same way as you sign in to an e-mail account and then go to your local system to pick up a file you prepared previously to attach to an e-mail).

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"**Your own CSV File Reference**" is where you can enter a short description of the upload. This can also include the date of submission.

Click on the 'Click to Upload CSV File' button to upload the file to the efileready.com server.

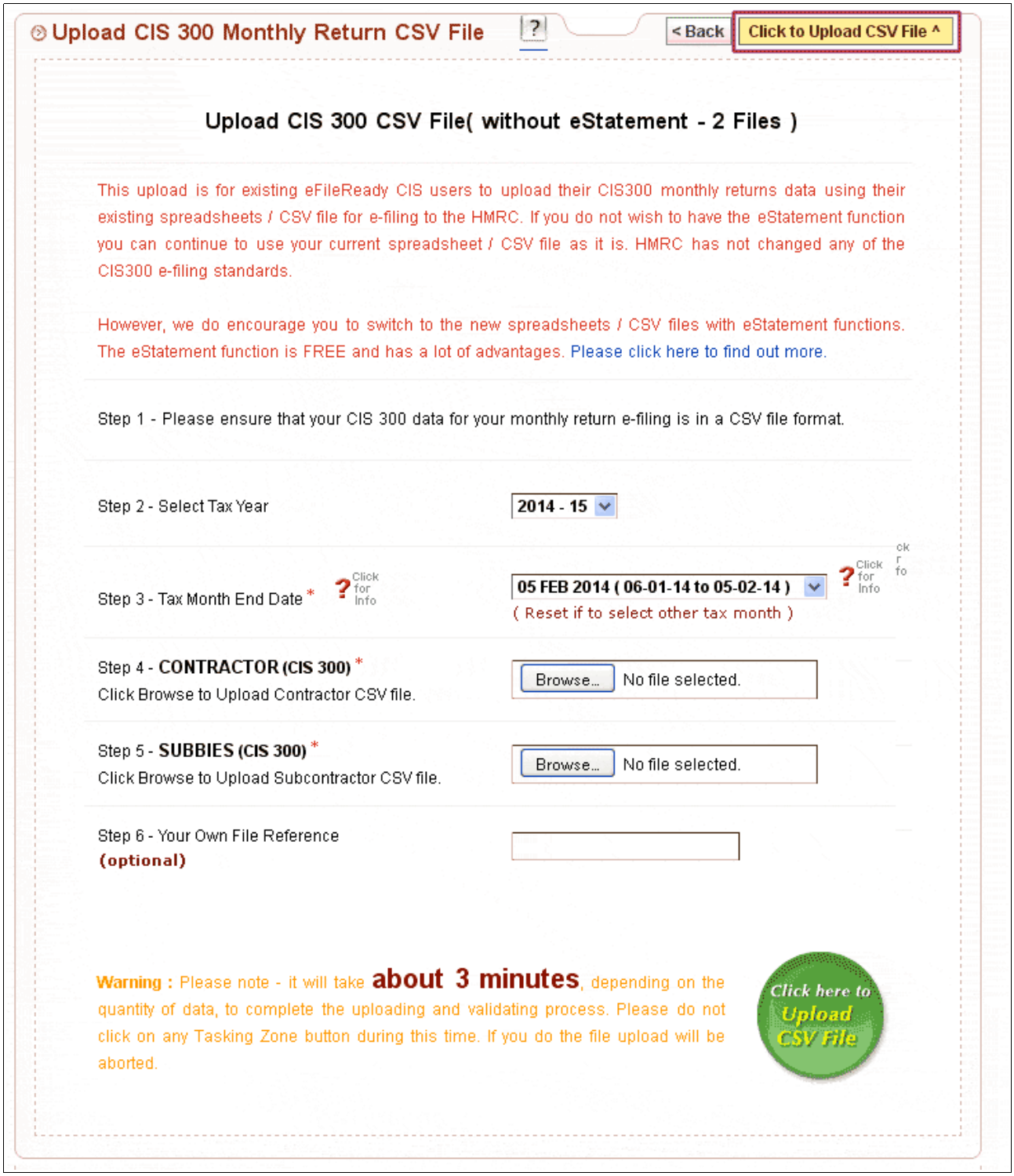
Upload CIS 300 Monthly Return CSV File
< Back
Click to Upload CSV File ^
Upload CIS 300 CSV File(without eStatement - 2 Files)
This upload is for existing eFileReady CIS users to upload their CIS300 monthly returns data using their existing spreadsheets / CSV file for e-filing to the HMRC. If you do not wish to have the eStatement function you can continue to use your current spreadsheet / CSV file as it is. HMRC has not changed any of the CIS300 e-filing standards.
However, we do encourage you to switch to the new spreadsheets / CSV files with eStatement functions. The eStatement function is FREE and has a lot of advantages. Please click here to find out more.
Step 1 - Please ensure that your CIS 300 data for your monthly return e-filing is in a CSV file format.
Step 2 - Select Tax Year
2014 - 15
Step 3 - Tax Month End Date *
05 FEB 2014 (06-01-14 to 05-02-14)
(Reset if to select other tax month)
Step 4 - CONTRACTOR (CIS 300) *
Click Browse to Upload Contractor CSV file.
Browse...
No file selected.
Step 5 - SUBBIES (CIS 300) *
Click Browse to Upload Subcontractor CSV file.
Browse...
No file selected.
Step 6 - Your Own File Reference
(optional)
Warning : Please note - it will take about 3 minutes, depending on the quantity of data, to complete the uploading and validating process. Please do not click on any Tasking Zone button during this time. If you do the file upload will be aborted.
Click here to Upload CSV File

Fig 4.3 Browse to find the files in your local system and then upload

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As you upload your CSV files, our service instantly converts the files into XML and validates them against the HMRC provided SCHEMA and BUSINESS RULES, ready for e-filing.

If no errors are found in the uploaded data, select E-filing/Status in the Tasking Zone to proceed on to e-file the uploaded file.

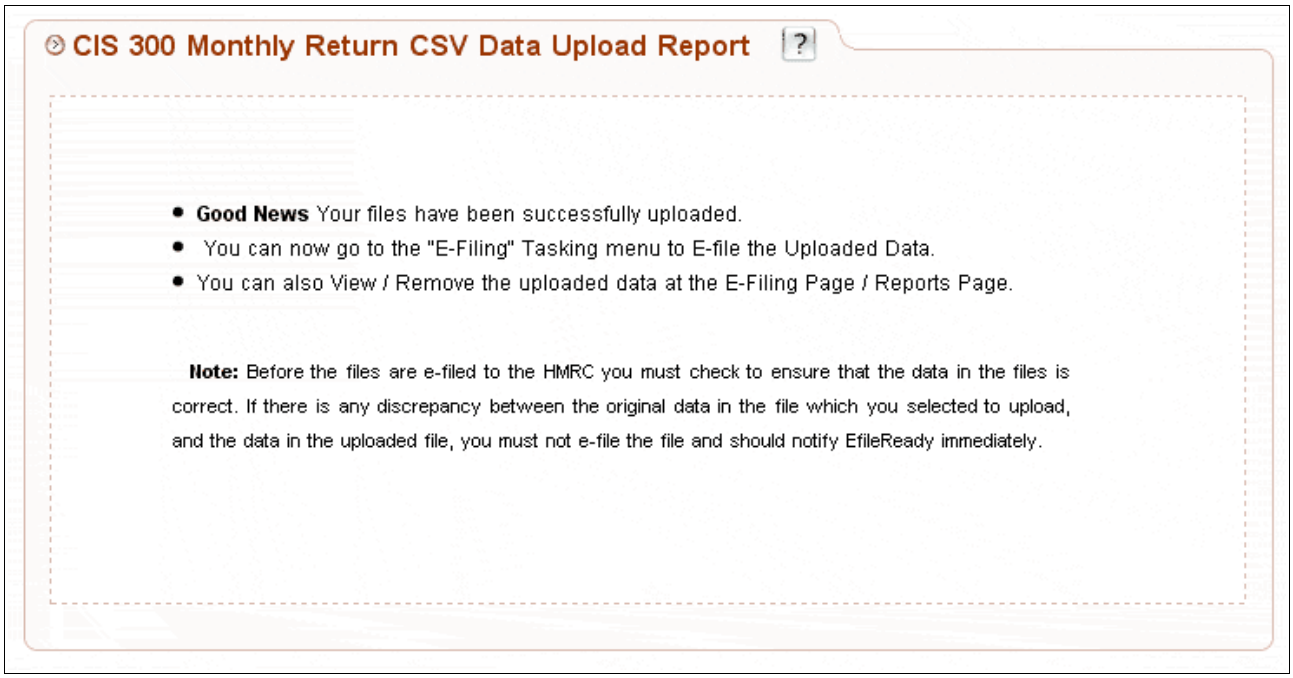
CIS 300 Monthly Return CSV Data Upload Report
?
Good News Your files have been successfully uploaded.
You can now go to the "E-Filing" Tasking menu to E-file the Uploaded Data.
You can also View / Remove the uploaded data at the E-Filing Page / Reports Page.
Note: Before the files are e-filed to the HMRC you must check to ensure that the data in the files is correct. If there is any discrepancy between the original data in the file which you selected to upload, and the data in the uploaded file, you must not e-file the file and should notify EfileReady immediately.

Fig 4.4 CSV Data Upload Report

© Intersoftware Solutions Limited.

If errors are found, an Error Report will be displayed on screen. You should amend the errors as indicated and then start the process again from Step 3.

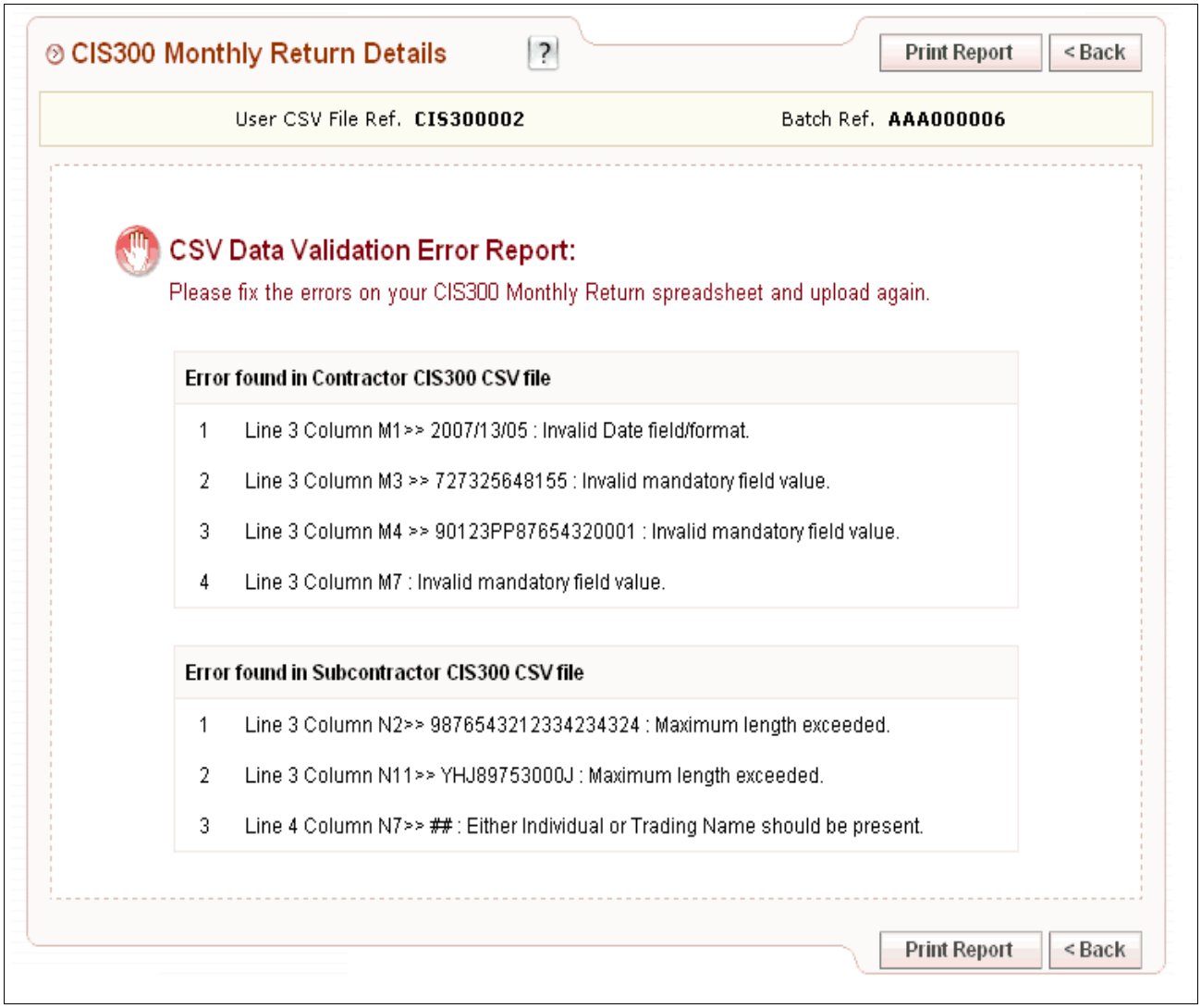
CIS300 Monthly Return Details
?
Print Report
< Back
User CSV File Ref. CIS300002
Batch Ref. AAA000006
CSV Data Validation Error Report:
Please fix the errors on your CIS300 Monthly Return spreadsheet and upload again.
Error found in Contractor CIS300 CSV file
1 Line 3 Column M1>> 2007/13/05 : Invalid Date field/format.
2 Line 3 Column M3 >> 727325648155 : Invalid mandatory field value.
3 Line 3 Column M4 >> 90123PP87654320001 : Invalid mandatory field value.
4 Line 3 Column M7 : Invalid mandatory field value.
Error found in Subcontractor CIS300 CSV file
1 Line 3 Column N2>> 98765432123342343 24 : Maximum length exceeded.
2 Line 3 Column N11>> YHJ89753000J : Maximum length exceeded.
3 Line 4 Column N7>> ## : Either Individual or Trading Name should be present.
Print Report
< Back

Fig 4.5 CSV Data Validation Error Report

© Intersoftware Solutions Limited.

Step 5. E-Filing your data

To e-file the uploaded data directly to HMRC, select E-filing from the Tasking Zone, then select the appropriate sub-menu.

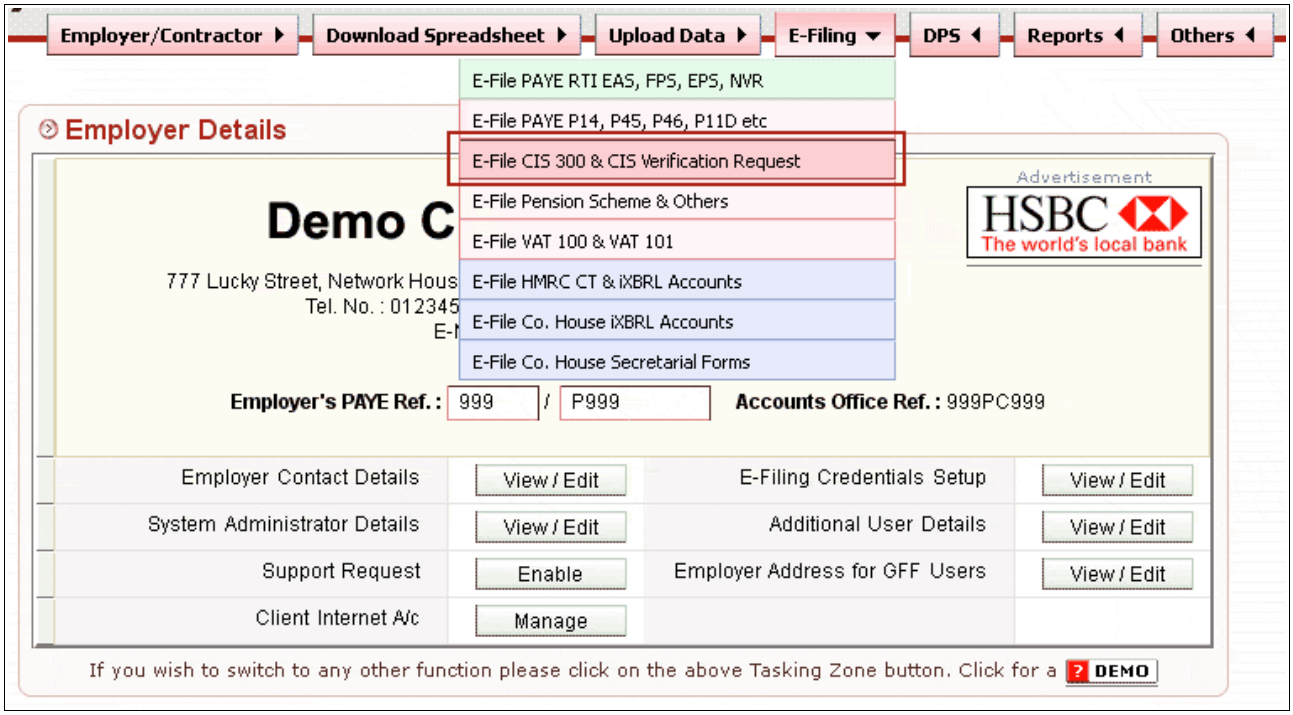

Fig 5.1 Click on the E-Filing sub-menu

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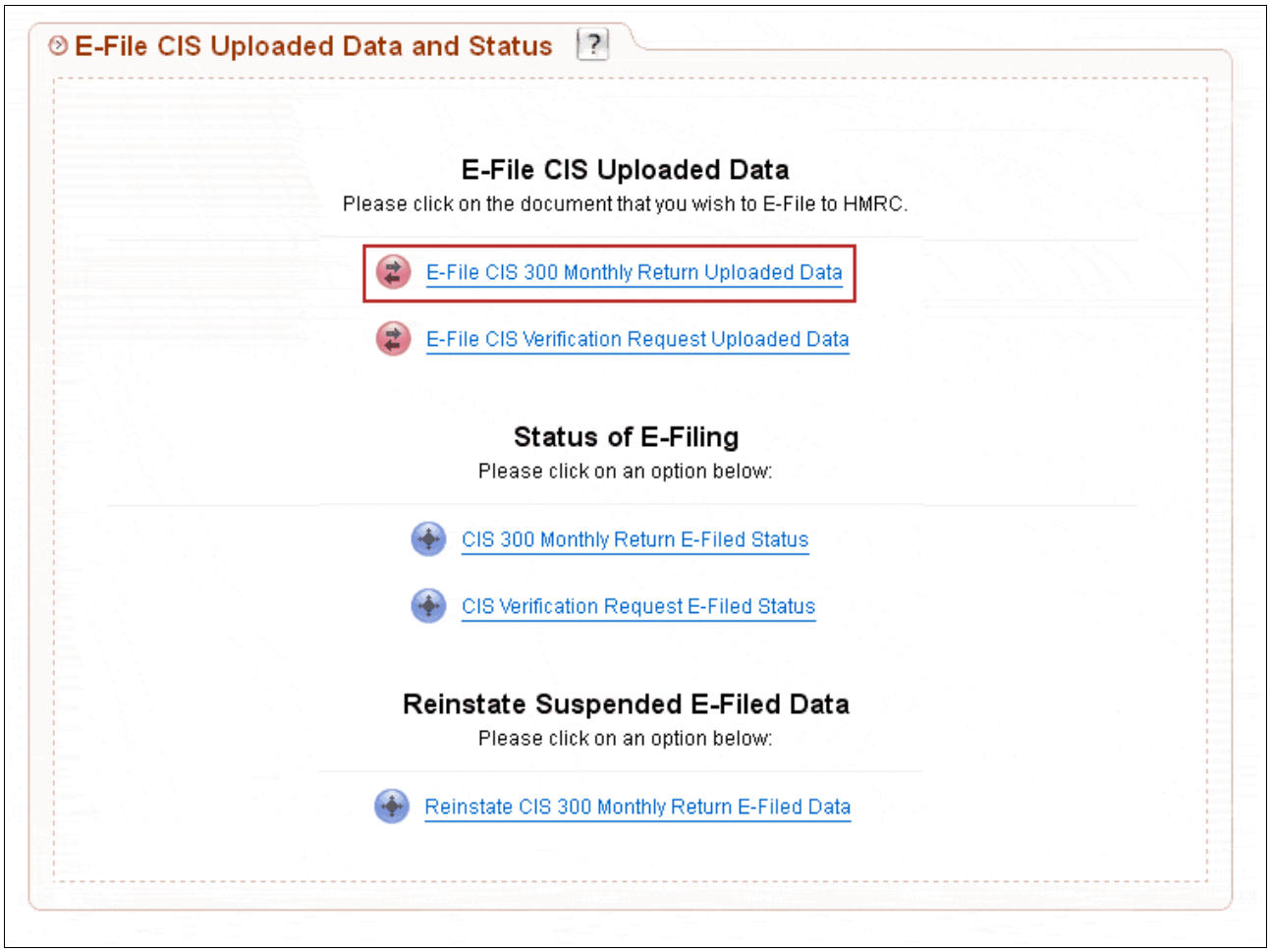
E-File CIS Uploaded Data and Status
?
E-File CIS Uploaded Data
Please click on the document that you wish to E-File to HMRC.
E-File CIS 300 Monthly Return Uploaded Data
E-File CIS Verification Request Uploaded Data
Status of E-Filing
Please click on an option below:
CIS 300 Monthly Return E-Filed Status
CIS Verification Request E-Filed Status
Reinstate Suspended E-Filed Data
Please click on an option below:
Reinstate CIS 300 Monthly Return E-Filed Data

Fig 5.2 Click on the appropriate E-File Document link

© Intersoftware Solutions Limited.

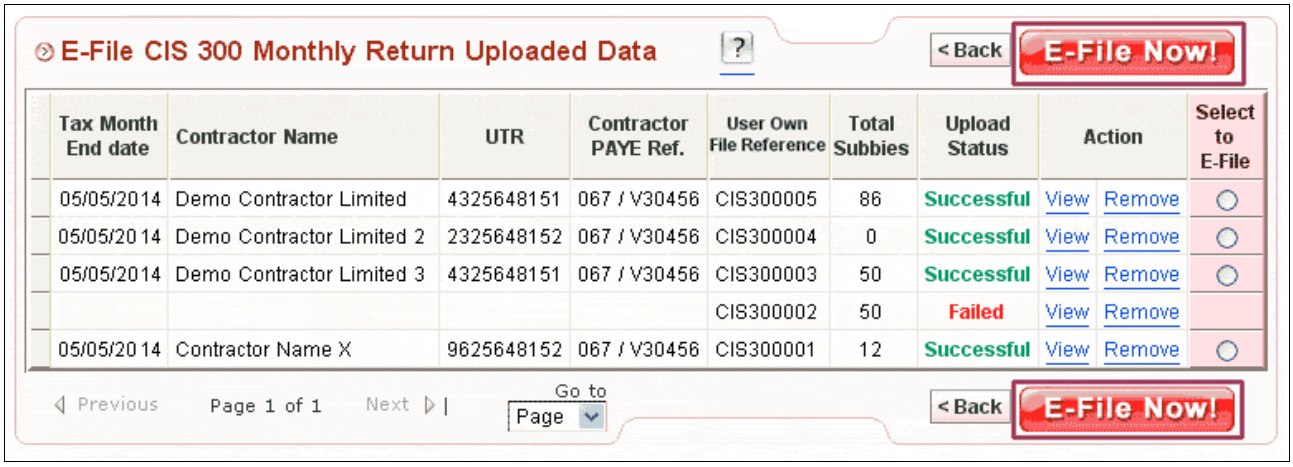
E-File CIS 300 Monthly Return Uploaded Data
?
< Back
E-File Now!
Tax Month End date
Contractor Name
UTR
Contractor PAYE Ref.
User Own File Reference
Total Subbies
Upload Status
Action
Select to E-File
05/05/2014 Demo Contractor Limited 4325648151 067 / V30456 CIS300005 86 Successful View Remove
05/05/2014 Demo Contractor Limited 2 2325648152 067 / V30456 CIS300004 0 Successful View Remove
05/05/2014 Demo Contractor Limited 3 4325648151 067 / V30456 CIS300003 50 Successful View Remove
CIS300002 50 Failed View Remove
05/05/2014 Contractor Name X 9625648152 067 / V30456 CIS300001 12 Successful View Remove
Previous
Page 1 of 1
Next
Go to Page
< Back
E-File Now!

Fig 5.3 View the data to be E-filed

Before e-filing your data to the HMRC you should double check to ensure that the data you have uploaded is correct. If it is correct, select those details you wish to e-file by ticking the appropriate tick boxes, then click on the 'E-file Now!' button.

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Contractor's Declaration
Cancel
Continue >
Contractor's Declaration
Tax Month End Date
05 MAY 2014 (05-04-2014 to 05-05-2014)
NOTE: Please check that you have entered your E-Filing Setup details correctly. i.e. ensure that you have selected either Contractor or Agent as appropriate, and that your E-Filing User ID and Password are both entered and up to date.
DECLARATION : I hereby confirm that I have checked through all the HMRC documents and records, consisting of CIS 300 Monthly Return CSV Data for my contractor, and to the best of my knowledge and belief these records are fully and truly stated.
Your Personal Name *
Robert Redford
Your Acting Capacity
Contractor
Enter User Sign In Password *
(eFileready Sign In Password)
Date and Time
14/05/2014 11:54:58
Continue to E-File

Fig 5.4 Enter your details on the Declaration page

© Intersoftware Solutions Limited.

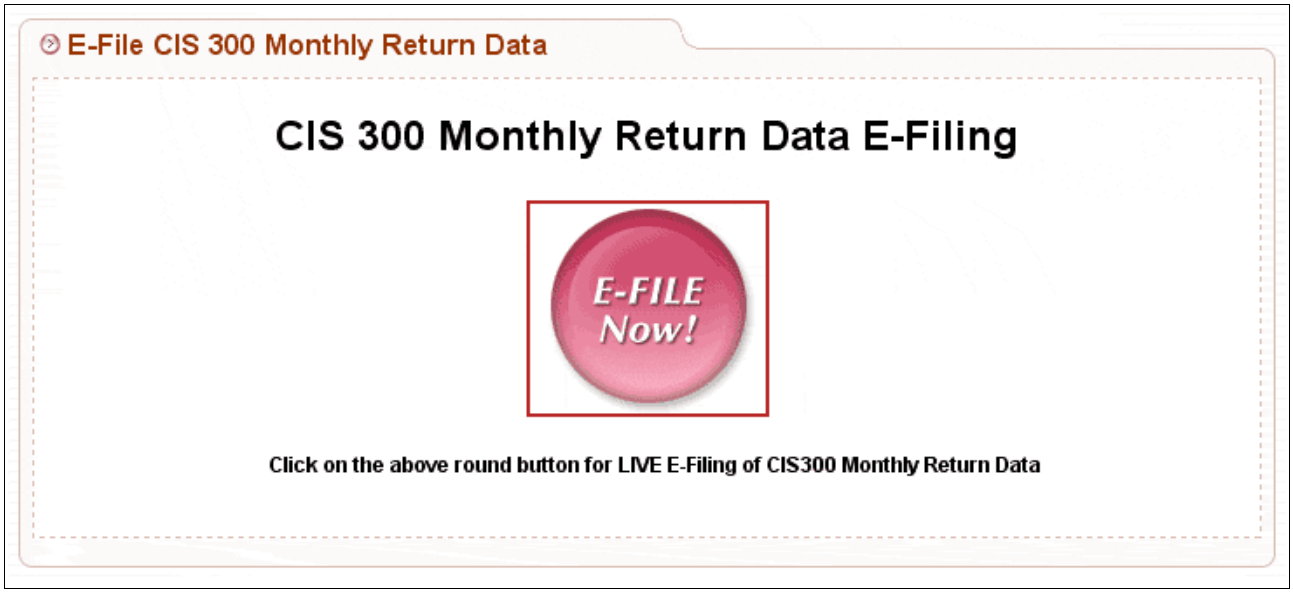
E-File CIS 300 Monthly Return Data
CIS 300 Monthly Return Data E-Filing
E-FILE Now!
Click on the above round button for LIVE E-Filing of CIS300 Monthly Return Data

Fig 5.5 Click on the 'E-file Now!' button to e-file your data to the HMRC

© Intersoftware Solutions Limited.

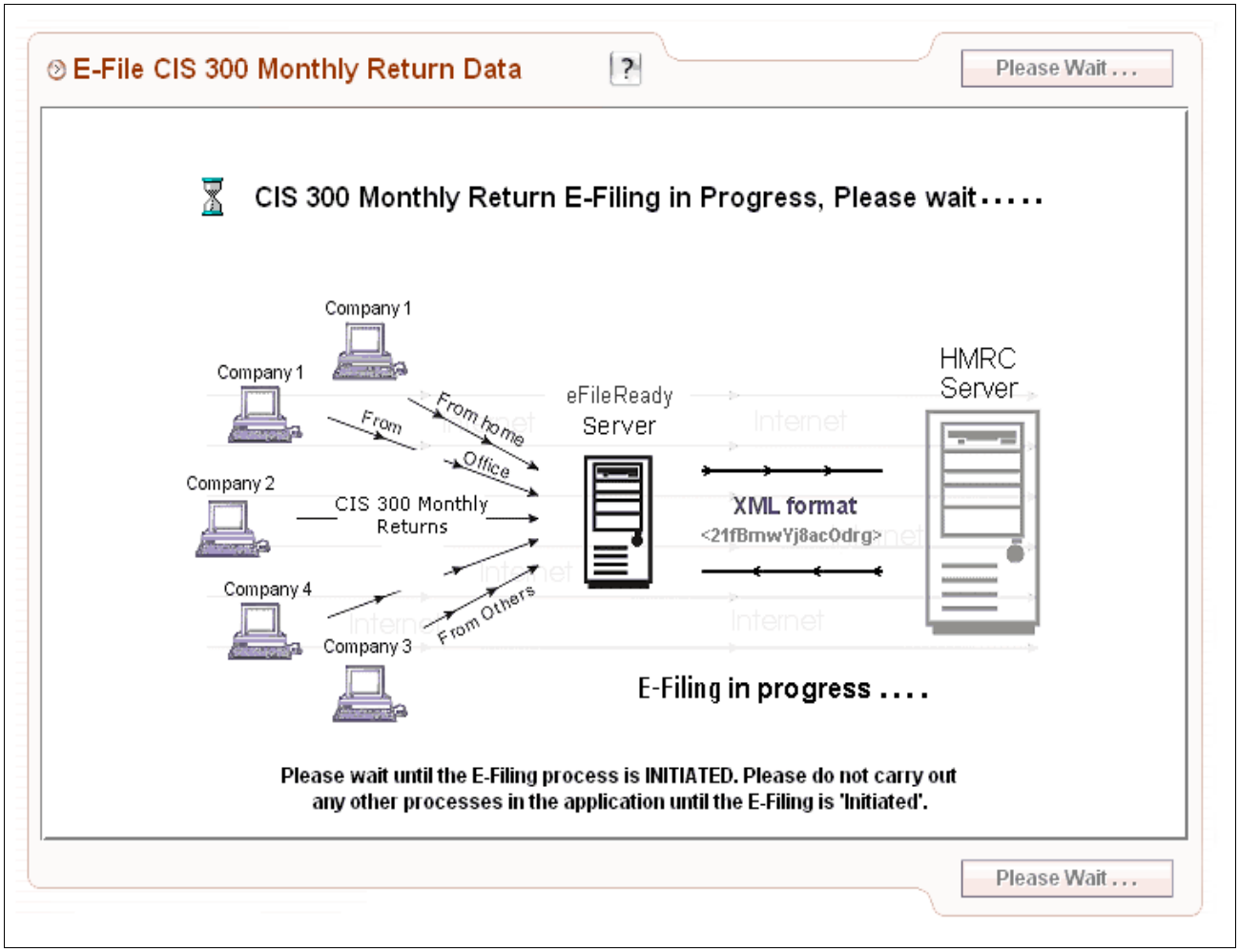
E-File CIS 300 Monthly Return Data
?
Please Wait . . .
CIS 300 Monthly Return E-Filing in Progress, Please wait . . . . .
Company 1
Company 1
Company 2
Company 4
Company 3
From
From home
Office
CIS 300 Monthly Returns
From Others
eFileReady Server
HMRC Server
XML format
<21fBmwYj8acOdrg>
E-Filing in progress . . . .
Please wait until the E-Filing process is INITIATED. Please do not carry out any other processes in the application until the E-Filing is 'Initiated'.
Please Wait . . .

Fig 5.6 E-Filing in progress

The above diagram will be displayed as you data is being sent to the HMRC. There may be a time delay before you receive a response from the HMRC, especially at peak times.

During this time you can either carry out other processes in the system, or sign out and sign back in later to check on the status of your e-filing.

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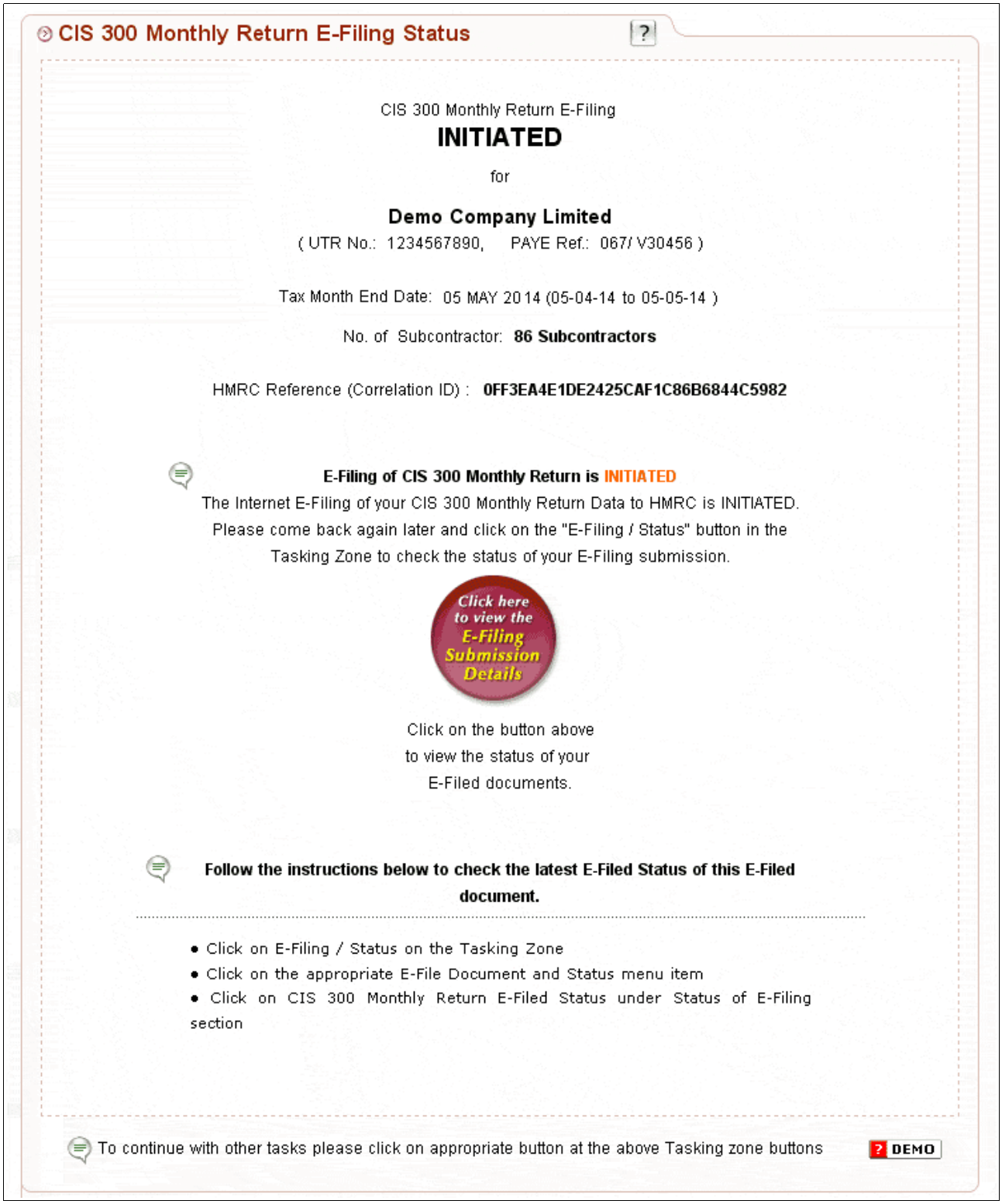
CIS 300 Monthly Return E-Filing Status
CIS 300 Monthly Return E-Filing
INITIATED
for
Demo Company Limited
(UTR No.: 1234567890, PAYE Ref.: 067/V30456)
Tax Month End Date: 05 MAY 2014 (05-04-14 to 05-05-14)
No. of Subcontractor: 86 Subcontractors
HMRC Reference (Correlation ID) : 0FF3EA4E1DE2425CAF1C86B6844C5982
E-Filing of CIS 300 Monthly Return is INITIATED
The Internet E-Filing of your CIS 300 Monthly Return Data to HMRC is INITIATED.
Please come back again later and click on the "E-Filing / Status" button in the
Tasking Zone to check the status of your E-Filing submission.
Click here to view the E-Filing Submission Details
Click on the button above
to view the status of your
E-Filed documents.
Follow the instructions below to check the latest E-Filed Status of this E-Filed document.
• Click on E-Filing / Status on the Tasking Zone
• Click on the appropriate E-File Document and Status menu item
• Click on CIS 300 Monthly Return E-Filed Status under Status of E-Filing section
To continue with other tasks please click on appropriate button at the above Tasking zone buttons
DEMO

Fig 5.7 E-Filing process initiated

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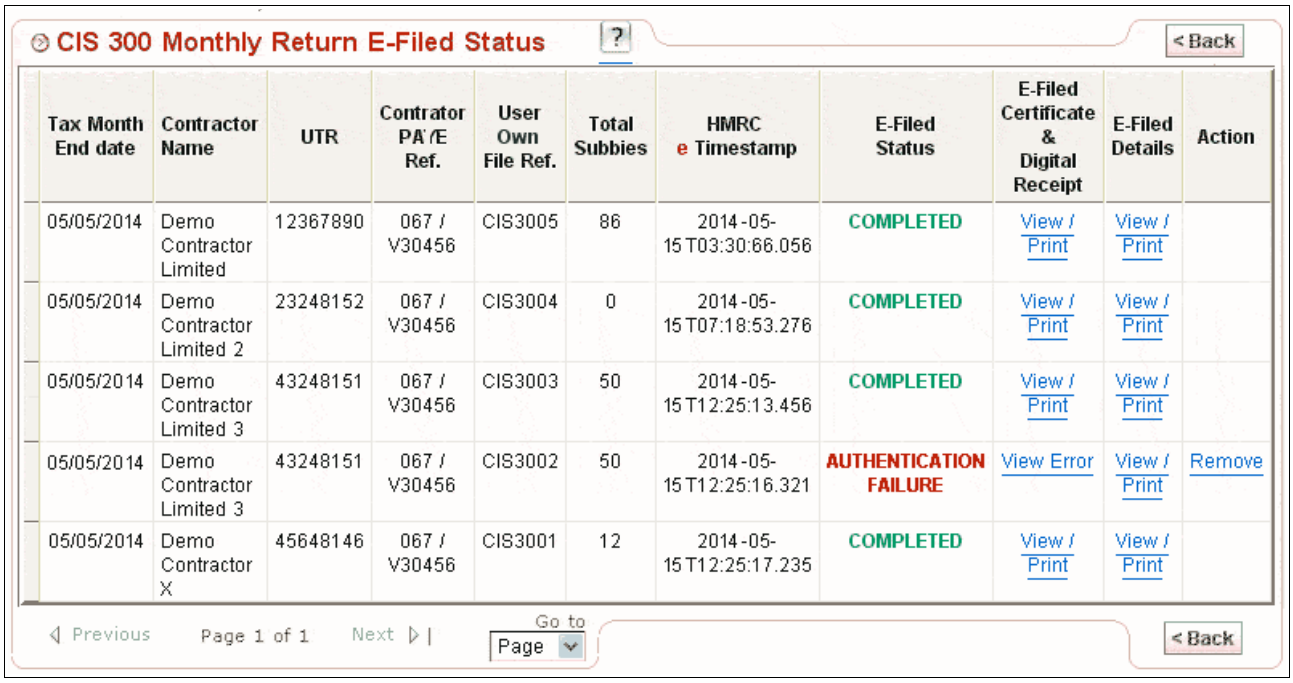
Check your E-filing Status.

Click on E-filing in the Tasking Zone to check the status of your e-filing. If the status is shown as 'Completed', this means the HMRC have received and accepted your e-filed submission. You can then print your e-filing Certificate as proof of your e-filing for your records.



CIS 300 Monthly Return E-Filed Status

< Back

Tax Month End date	Contractor Name	UTR	Contrator PAYE Ref.	User Own File Ref.	Total Subbies	HMRC e Timestamp	E-Filed Status	E-Filed Certificate & Digital Receipt	E-Filed Details	Action
05/05/2014	Demo Contractor Limited	12367890	067 / V30456	CIS3005	86	2014-05-15T03:30:66.056	COMPLETED	View / Print	View / Print	
05/05/2014	Demo Contractor Limited 2	23248152	067 / V30456	CIS3004	0	2014-05-15T07:18:53.276	COMPLETED	View / Print	View / Print	
05/05/2014	Demo Contractor Limited 3	43248151	067 / V30456	CIS3003	50	2014-05-15T12:25:13.456	COMPLETED	View / Print	View / Print	
05/05/2014	Demo Contractor Limited 3	43248151	067 / V30456	CIS3002	50	2014-05-15T12:25:16.321	AUTHENTICATION FAILURE	View Error	View / Print	Remove
05/05/2014	Demo Contractor X	45648146	067 / V30456	CIS3001	12	2014-05-15T12:25:17.235	COMPLETED	View / Print	View / Print	

Previous Page 1 of 1 Next | Go to Page

< Back

Fig 5.8 E-Filing / Status

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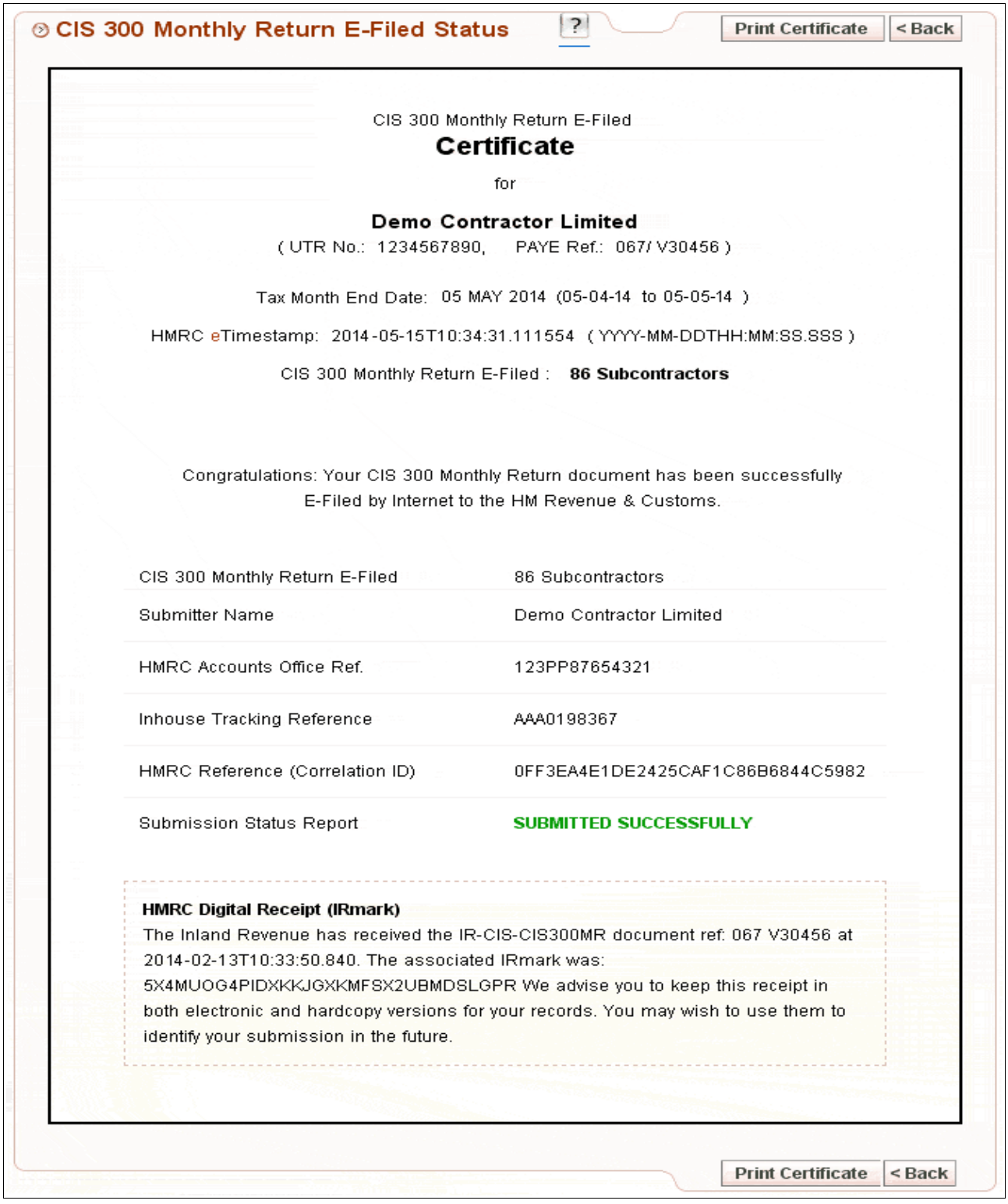
CIS 300 Monthly Return E-Filed Status
Print Certificate
< Back
CIS 300 Monthly Return E-Filed
Certificate
for
Demo Contractor Limited
(UTR No.: 1234567890, PAYE Ref.: 067/ V30456)
Tax Month End Date: 05 MAY 2014 (05-04-14 to 05-05-14)
HMRC eTimestamp: 2014-05-15T10:34:31.111554 (YYYY-MM-DDTHH:MM:SS.SSS)
CIS 300 Monthly Return E-Filed : 86 Subcontractors
Congratulations: Your CIS 300 Monthly Return document has been successfully E-Filed by Internet to the HM Revenue & Customs.
CIS 300 Monthly Return E-Filed
86 Subcontractors
Submitter Name
Demo Contractor Limited
HMRC Accounts Office Ref.
123PP87654321
Inhouse Tracking Reference
AAA0198367
HMRC Reference (Correlation ID)
0FF3EA4E1DE2425CAF1C86B6844C5982
Submission Status Report
SUBMITTED SUCCESSFULLY
HMRC Digital Receipt (IRmark)
The Inland Revenue has received the IR-CIS-CIS300MR document ref: 067 V30456 at 2014-02-13T10:33:50.840. The associated IRmark was: 5X4MUOG4PIDXKKJGXKMFSX2UBMDSLGPR We advise you to keep this receipt in both electronic and hardcopy versions for your records. You may wish to use them to identify your submission in the future.
Print Certificate
< Back

Fig 5.9 E-Filing Acceptance Certificate

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Step 6. E-Filing as an Agent / Company / Employer – HMRC Credentials Set up

If you are an agent / pension scheme administrator / company using our service, you have to enter your Agent / company details to file the returns online to HMRC. To do this select Employer / Contractor from the Tasking Zone menu, further select the HMRC E-File Credentials Setup, then click on the appropriate link for E-filing Setup.

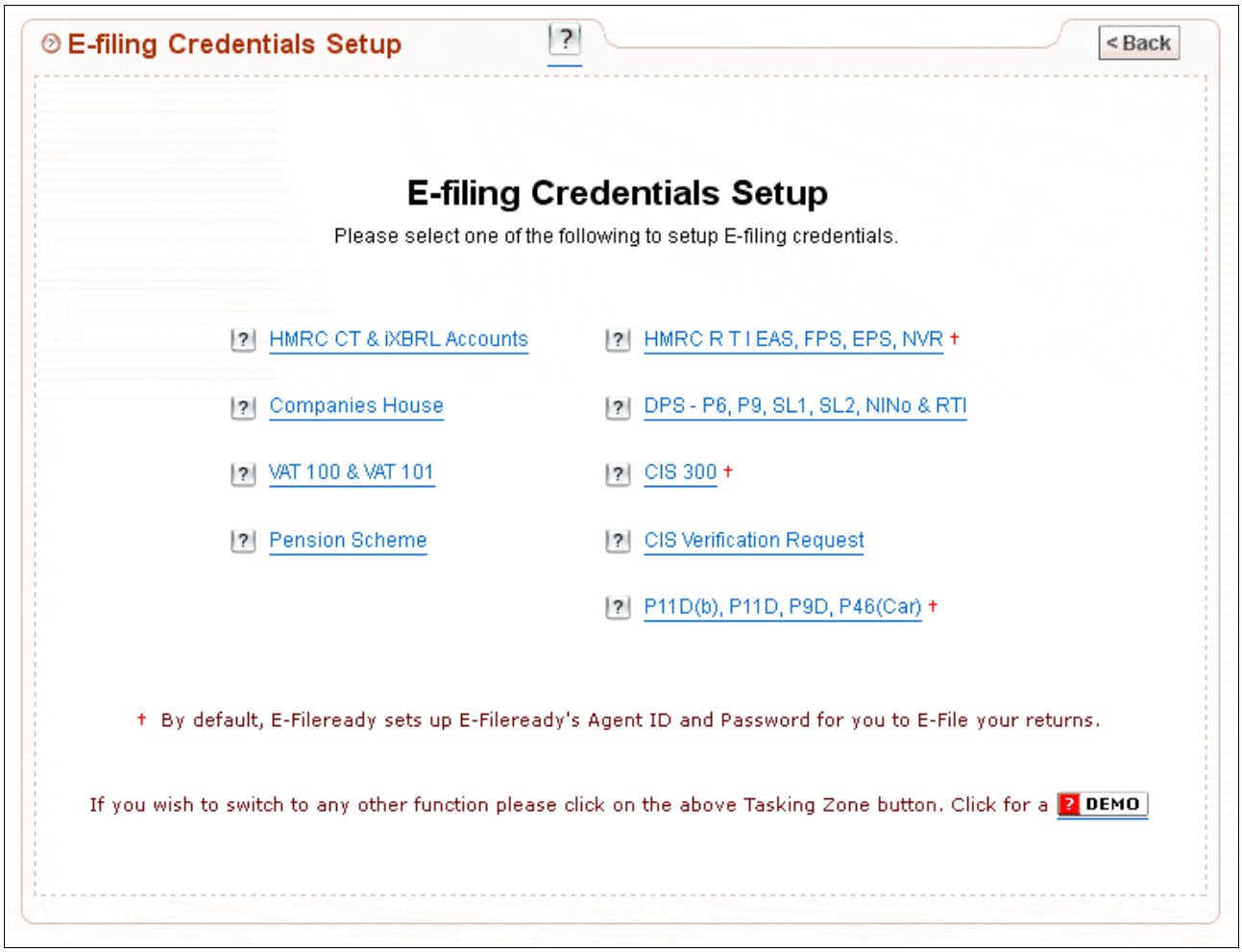
E-filing Credentials Setup
< Back
E-filing Credentials Setup
Please select one of the following to setup E-filing credentials.
HMRC CT & iXBRL Accounts
HMRC R T I EAS, FPS, EPS, NVR +
Companies House
DPS - P6, P9, SL1, SL2, NINo & RTI
VAT 100 & VAT 101
CIS 300 +
Pension Scheme
CIS Verification Request
P11D(b), P11D, P9D, P46(Car) +
+ By default, E-Fileready sets up E-Fileready's Agent ID and Password for you to E-File your returns.
If you wish to switch to any other function please click on the above Tasking Zone button. Click for a DEMO

Fig 6.0 E-Filing Setup

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CIS 300 E-Filing Setup

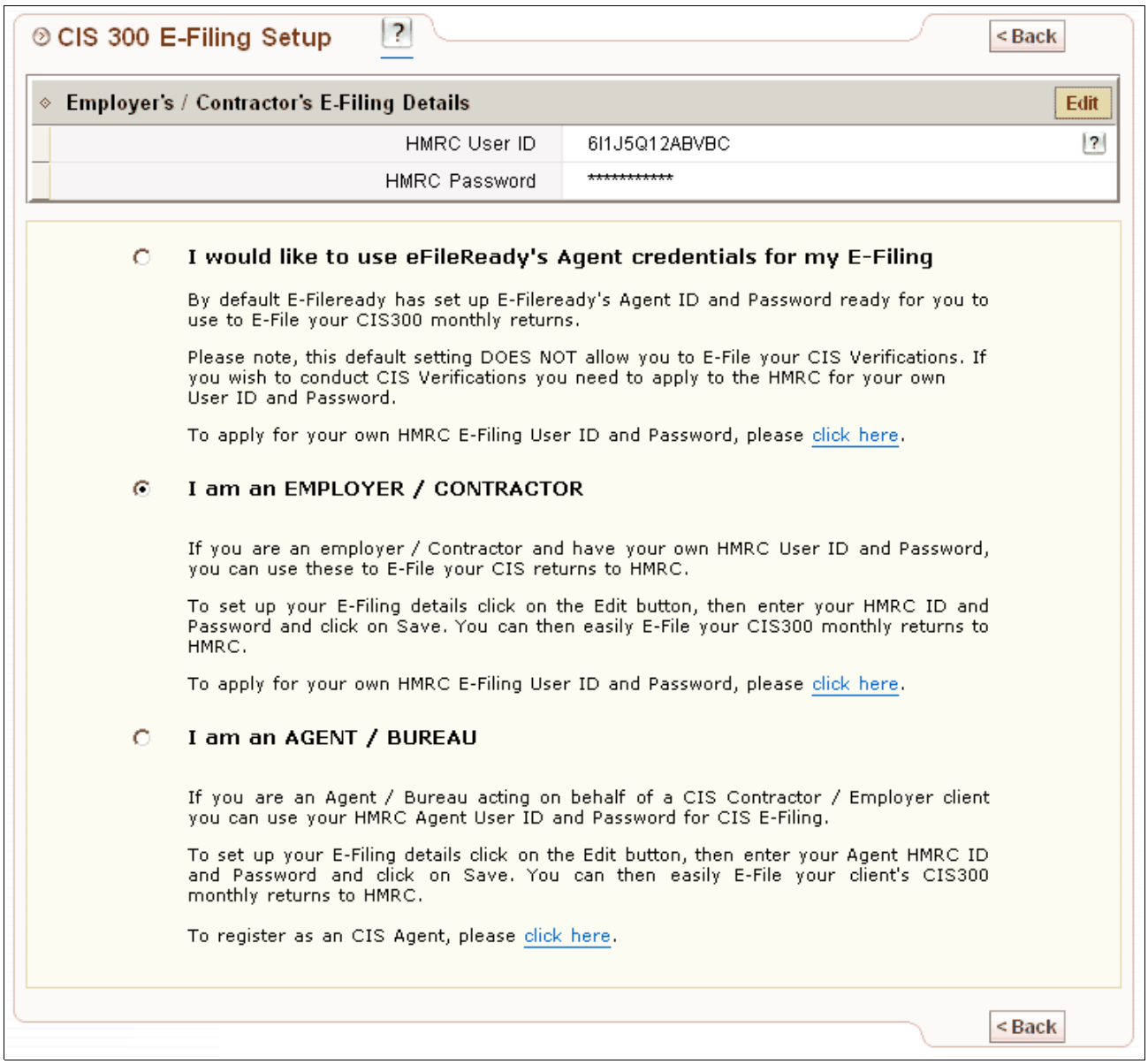
CIS 300 E-Filing Setup
?
< Back
Employer's / Contractor's E-Filing Details
Edit
HMRC User ID
6I1J5Q12ABVBC
?
HMRC Password
****
I would like to use eFileReady's Agent credentials for my E-Filing
By default E-Fileready has set up E-Fileready's Agent ID and Password ready for you to use to E-File your CIS300 monthly returns.
Please note, this default setting DOES NOT allow you to E-File your CIS Verifications. If you wish to conduct CIS Verifications you need to apply to the HMRC for your own User ID and Password.
To apply for your own HMRC E-Filing User ID and Password, please click here.
I am an EMPLOYER / CONTRACTOR
If you are an employer / Contractor and have your own HMRC User ID and Password, you can use these to E-File your CIS returns to HMRC.
To set up your E-Filing details click on the Edit button, then enter your HMRC ID and Password and click on Save. You can then easily E-File your CIS300 monthly returns to HMRC.
To apply for your own HMRC E-Filing User ID and Password, please click here.
I am an AGENT / BUREAU
If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client you can use your HMRC Agent User ID and Password for CIS E-Filing.
To set up your E-Filing details click on the Edit button, then enter your Agent HMRC ID and Password and click on Save. You can then easily E-File your client's CIS300 monthly returns to HMRC.
To register as an CIS Agent, please click here.
< Back

Fig 6.1 Select and enter your Employer / Agent HMRC User ID & Password

If you are an employer / Contractor and have your own HMRC User ID and Password, select I am an Employer / Contractor option. Please enter your HMRC User ID and Password to efile your CIS 300 returns to HMRC

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client, select I am an Agent / Bureau option and enter your HMRC Agent User ID and Password for CIS E-Filing.

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Please note, to efile the CIS 300 returns as an Agent, you should have registered as an CIS Agent with HMRC.

If you do not have the HMRC User ID and Password, you can use the E-Fileready's Agent ID and Password to E-File your CIS300 monthly returns.To use this option, please select I would like to use eFileReady's Agent credentials for my E-Filing option.

Please note, this default setting DOES NOT allow you to E-File your CIS Verifications. If you wish to conduct CIS Verifications you need to apply to the HMRC for your own User ID and Password.

CIS Verification Request E-Filing Setup

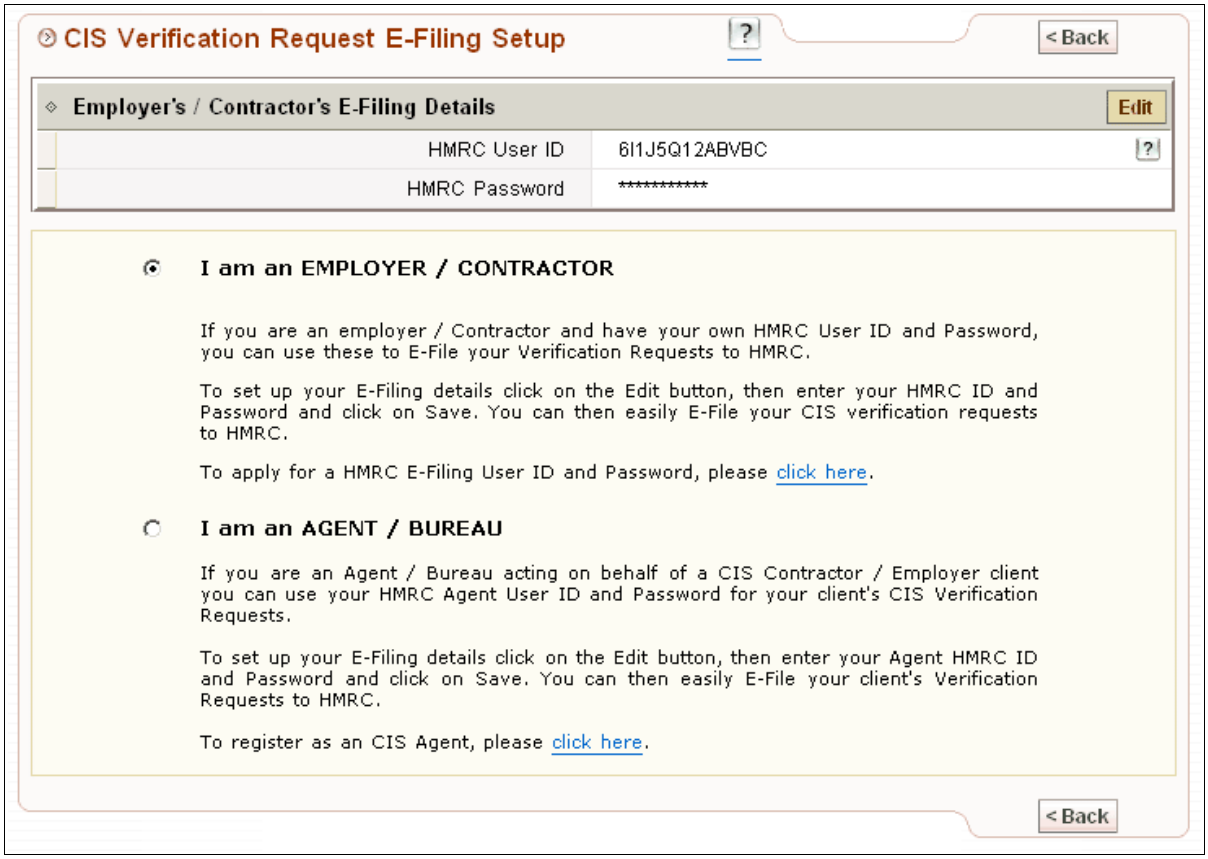
CIS Verification Request E-Filing Setup
?
< Back
Employer's / Contractor's E-Filing Details
Edit
HMRC User ID
6I1J5Q12ABVBC
?
HMRC Password
****
I am an EMPLOYER / CONTRACTOR
If you are an employer / Contractor and have your own HMRC User ID and Password, you can use these to E-File your Verification Requests to HMRC.
To set up your E-Filing details click on the Edit button, then enter your HMRC ID and Password and click on Save. You can then easily E-File your CIS verification requests to HMRC.
To apply for a HMRC E-Filing User ID and Password, please click here.
I am an AGENT / BUREAU
If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client you can use your HMRC Agent User ID and Password for your client's CIS Verification Requests.
To set up your E-Filing details click on the Edit button, then enter your Agent HMRC ID and Password and click on Save. You can then easily E-File your client's Verification Requests to HMRC.
To register as an CIS Agent, please click here.
< Back

Fig 6.2 Select and enter your Employer / Agent HMRC User ID & Password

If you are an employer / Contractor and have your own HMRC User ID and Password, select I am an Employer / Contractor option. Please enter your HMRC User ID and Password to efile your Verification Requests to HMRC.

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client, select I am an Agent / Bureau option and enter your HMRC Agent User ID and Password for your client's CIS Verification Requests.

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Step 7. Appointing Additional Users

If you wish to allow additional users to access your eFileReady account, in the Tasking Zone menu click on Employer/Contractor, further select the sub-menu Employer/Contractor Details. Click on the 'View/Edit' button for Additional User Details, then click on the 'Add New User' button and enter the requested details.

Employer Details
?
Advertisement
Demo Company Ltd.
HSBC
The world's local bank
777 Lucky Street, Network House, Boston, County, BR5 6BP, United Kingdom.
Tel. No. : 012345 6789 Fax No. : 0123456789
E-Mail : Website :
Employer's PAYE Ref. : 999 / P999
Accounts Office Ref. : 999PC999
Employer Contact Details
View / Edit
E-Filing Credentials Setup
View / Edit
System Administrator Details
View / Edit
Additional User Details
View / Edit
Support Request
Enable
Employer Address for GFF Users
View / Edit
Client Internet A/c
Manage
If you wish to switch to any other function please click on the above Tasking Zone button. Click for a
DEMO

Fig 7.1 Click on the Additional User Details button

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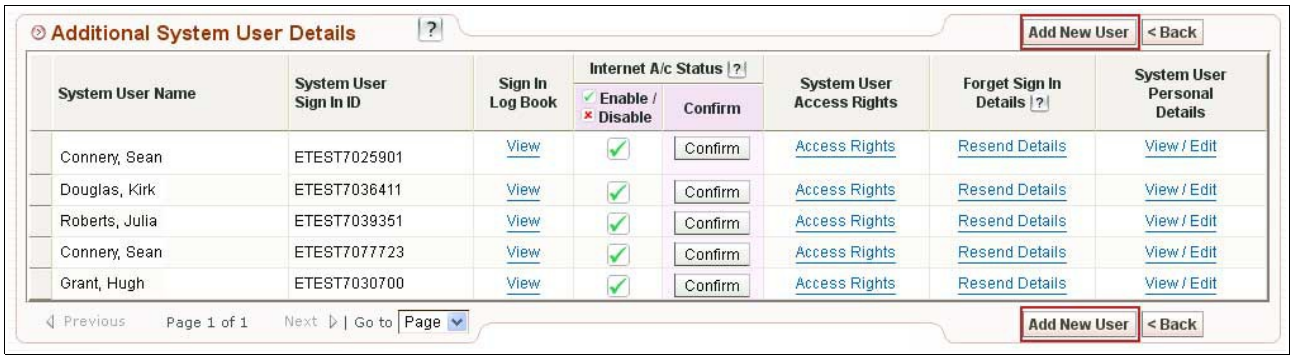
Additional System User Details
Add New User
< Back
System User Name
System User Sign In ID
Sign In Log Book
Internet A/c Status
Enable / Disable
Confirm
System User Access Rights
Forget Sign In Details
System User Personal Details
Connery, Sean ETEST7025901 View Confirm Access Rights Resend Details View / Edit
Douglas, Kirk ETEST7036411 View Confirm Access Rights Resend Details View / Edit
Roberts, Julia ETEST7039351 View Confirm Access Rights Resend Details View / Edit
Connery, Sean ETEST7077723 View Confirm Access Rights Resend Details View / Edit
Grant, Hugh ETEST7030700 View Confirm Access Rights Resend Details View / Edit
Previous
Page 1 of 1
Next
Go to Page
Add New User
< Back

Fig 7.2 Click on Add New User

On this screen, as well as adding new users, you can also control the access rights of your existing additional users, send them reminders of their sign in details should they ever forget them, and even view a log of their previous sign ins.

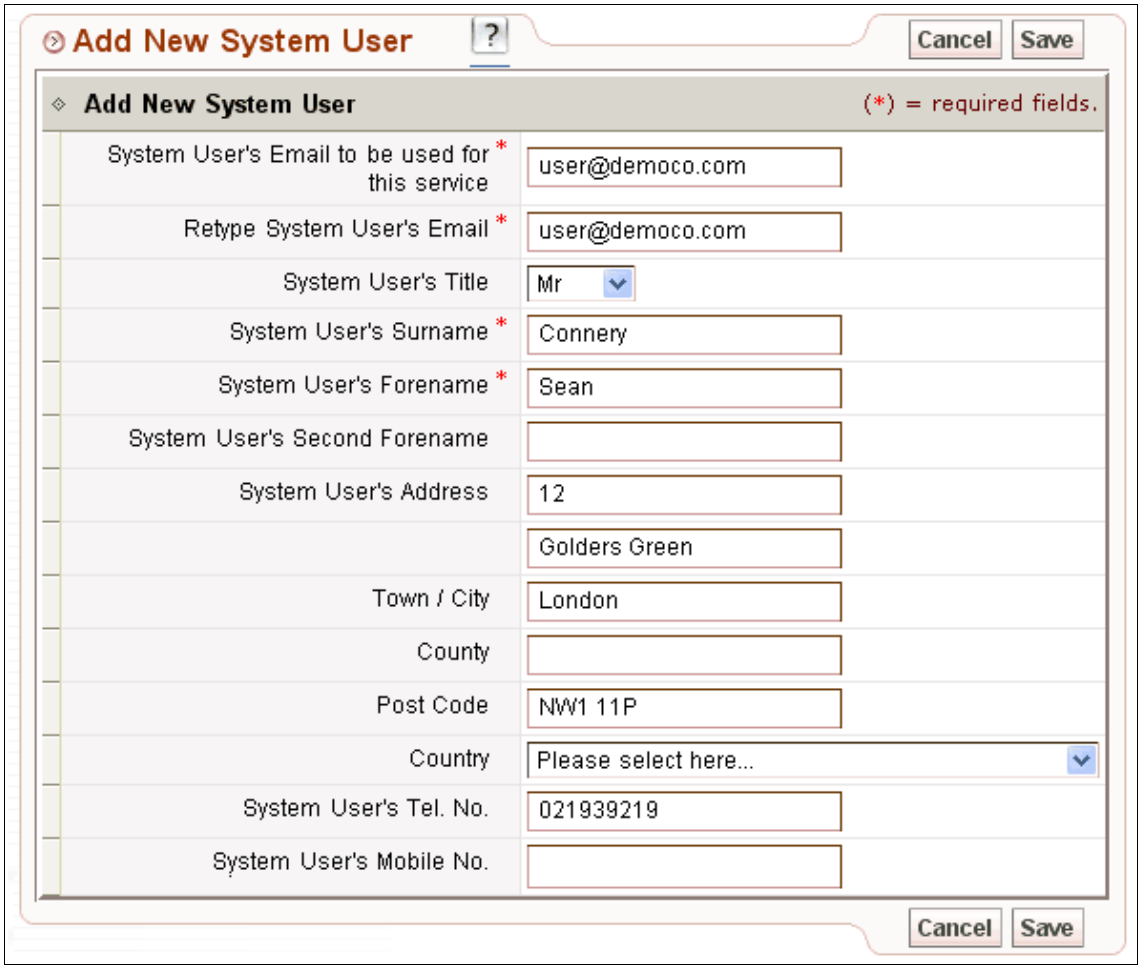

Fig 7.3 Enter the details of your Additional User

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Other E-Filing Services

(Automated E-filing to the HMRC at anytime over the Internet)

1. **E-filing of CIS 300 Monthly Returns**
2. **Verification of Sub-Contractors' Tax Status**
3. **E-filing of Pension, VAT and other returns**
4. **Data Provisioning Services (DPS) Downloading**
5. **E-filing of P11D, P11D(B), P46(CAR)**
6. **E-Filing of CT and iXBRL Accounts to HMRC**
7. **E-Filing of Companies House iXBRL Accounts**
8. **E-Filing of Companies House Secretarial forms**
9. **E-Filing of Companies House Incorporation forms**
10. **E-Filing RTI Returns (EAS, FFPS, FPS, EPS, NVR)**

Click here to log on to www.eFileReady.com

(For more information about our products and services, please contact our Support Team.)

Support Email: Kevin.Munn@eFileReady.com **Tel: 020 8452 9516**

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